

Informatica® Cloud Data Integration

# Anaplan V2 Connector

Informatica Cloud Data Integration Anaplan V2 Connector April 2024

#### © Copyright Informatica LLC 2016, 2024

This software and documentation are provided only under a separate license agreement containing restrictions on use and disclosure. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC.

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation is subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License.

Informatica, the Informatica logo, Informatica Cloud, and PowerCenter are trademarks or registered trademarks of Informatica LLC in the United States and many jurisdictions throughout the world. A current list of Informatica trademarks is available on the web at https://www.informatica.com/trademarks.html. Other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties. Required third party notices are included with the product.

See patents at https://www.informatica.com/legal/patents.html.

DISCLAIMER: Informatica LLC provides this documentation "as is" without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of noninfringement, merchantability, or use for a particular purpose. Informatica LLC does not warrant that this software or documentation is error free. The information provided in this software or documentation may include technical inaccuracies or typographical errors. The information in this software and documentation is subject to change at any time without notice.

#### NOTICES

This Informatica product (the "Software") includes certain drivers (the "DataDirect Drivers") from DataDirect Technologies, an operating company of Progress Software Corporation ("DataDirect") which are subject to the following terms and conditions:

- 1. THE DATADIRECT DRIVERS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.
- 2. IN NO EVENT WILL DATADIRECT OR ITS THIRD PARTY SUPPLIERS BE LIABLE TO THE END-USER CUSTOMER FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR OTHER DAMAGES ARISING OUT OF THE USE OF THE ODBC DRIVERS, WHETHER OR NOT INFORMED OF THE POSSIBILITIES OF DAMAGES IN ADVANCE. THESE LIMITATIONS APPLY TO ALL CAUSES OF ACTION, INCLUDING, WITHOUT LIMITATION, BREACH OF CONTRACT, BREACH OF WARRANTY. NEGLIGENCE. STRICT LIABILITY. MISREPRESENTATION AND OTHER TORTS.

The information in this documentation is subject to change without notice. If you find any problems in this documentation, report them to us at infa\_documentation@informatica.com.

Informatica products are warranted according to the terms and conditions of the agreements under which they are provided. INFORMATICA PROVIDES THE INFORMATION IN THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT.

Publication Date: 2024-04-08

# **Table of Contents**

Preface
Informatica Resources
Informatica Documentation
Informatica Intelligent Cloud Services web site
Informatica Intelligent Cloud Services Communities
Informatica Intelligent Cloud Services Marketplace
Data Integration connector documentation
Informatica Knowledge Base
Informatica Intelligent Cloud Services Trust Center
Informatica Global Customer Support
Chapter 1: Introduction to Anaplan V2 Connector 6
Anaplan V2 Connector Implementation
Administration of Anaplan V2 Connector
Get the Certificate from a Certificate Authority
Create a Java KeyStore
Rules and Guidelines for Anaplan V2 Connector
Behavioral Difference Between Anaplan and Anaplan V2 Connector
Chapter 2: Anaplan V2 Connections
Anaplan V2 connection properties
Configuring Proxy Settings
Configuring Anaplan V2 Connection with Basic Authentication
Configuring Anaplan V2 Connection with Certificate-Based Authentication
Certificate Issued by Anaplan
Certificate Issued by a Certificate Authority
Chapter 3: Synchronization Tasks with Anaplan V2 Connector 18
Anaplan V2 Sources in Synchronization Tasks
Anaplan V2 Targets in Synchronization Tasks
Synchronization Task Example
Chapter 4: Mappings and mapping tasks with Anaplan Connector 21
Anaplan V2 sources in mappings and mapping tasks
Anaplan targets in mappings and mapping tasks
Index

# Preface

Use *Anaplan V2 Connector* to learn how to read from or write to Anaplan by using Cloud Data Integration. Learn to create a Anaplan V2 connection, develop and run synchronization tasks, mappings, 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.

#### Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <a href="https://docs.informatica.com">https://docs.informatica.com</a>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa\_documentation@informatica.com.

#### Informatica Intelligent Cloud Services web site

You can access the Informatica Intelligent Cloud Services web site at <a href="http://www.informatica.com/cloud">http://www.informatica.com/cloud</a>. This site contains information about Informatica Cloud integration services.

#### Informatica Intelligent Cloud Services Communities

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

Access the Informatica Intelligent Cloud Services Community at:

 $\underline{https://network.informatica.com/community/informatica-network/products/cloud-integration}$ 

Developers can learn more and share tips at the Cloud Developer community:

https://network.informatica.com/community/informatica-network/products/cloud-integration/cloud-developers

#### Informatica Intelligent Cloud Services Marketplace

Visit the Informatica Marketplace to try and buy Data Integration Connectors, templates, and mapplets:

#### Data Integration connector documentation

You can access documentation for Data Integration Connectors at the Documentation Portal. To explore the Documentation Portal, visit https://docs.informatica.com.

#### Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <a href="https://search.informatica.com">https://search.informatica.com</a>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB\_Feedback@informatica.com.

#### Informatica Intelligent Cloud Services Trust Center

The Informatica Intelligent Cloud Services Trust Center provides information about Informatica security policies and real-time system availability.

You can access the trust center at https://www.informatica.com/trust-center.html.

Subscribe to the Informatica Intelligent Cloud Services Trust Center to receive upgrade, maintenance, and incident notifications. The Informatica Intelligent Cloud Services Status page displays the production status of all the Informatica cloud products. All maintenance updates are posted to this page, and during an outage, it will have the most current information. To ensure you are notified of updates and outages, you can subscribe to receive updates for a single component or all Informatica Intelligent Cloud Services components. Subscribing to all components is the best way to be certain you never miss an update.

To subscribe, on the <u>Informatica Intelligent Cloud Services Status</u> page, click **SUBSCRIBE TO UPDATES**. You can choose to receive notifications sent as emails, SMS text messages, webhooks, RSS feeds, or any combination of the four.

#### Informatica Global Customer Support

You can contact a Global Support Center through the Informatica Network or by telephone.

To find online support resources on the Informatica Network, click **Contact Support** in the Informatica Intelligent Cloud Services Help menu to go to the **Cloud Support** page. The **Cloud Support** page includes system status information and community discussions. Log in to Informatica Network and click **Need Help** to find additional resources and to contact Informatica Global Customer Support through email.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <a href="https://www.informatica.com/services-and-training/support-services/contact-us.html">https://www.informatica.com/services-and-training/support-services/contact-us.html</a>.

#### CHAPTER 1

# Introduction to Anaplan V2 Connector

You can use Anaplan V2 Connector to connect to any source and target in Data Integration.

Anaplan V2 Connector offers a variety of operations that you can perform such as import, export, process, and delete data. The connector streamlines your tasks, and simplifies setup without requiring manual operations or script writing to perform operations in Anaplan.

You can use Anaplan objects as sources and targets in synchronization tasks, mappings, and mapping tasks. You can switch mappings to advanced mode to include transformations and functions that enable advanced functionality.

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

**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.

# Anaplan V2 Connector Implementation

Anaplan Operation	Source Connection	Target Connection	Informatica Operation Type
Export	Anaplan	Any connection	INSERT
Import	Any connection	Anaplan	INSERT
Process	Any connection	Anaplan	INSERT
Delete	Any connection	Anaplan	INSERT

### Administration of Anaplan V2 Connector

As a user, you can use Anaplan V2 Connector after the organization administrator ensures that users have access to the Secure Agent directory that contains the success and error files. This directory path must be

the same on each Secure Agent machine in the runtime environment. The organization administrator must also perform the following tasks:

- Create an Anaplan user account with access to the model and workspace.
- Configure the following Anaplan actions: import, export, delete, and process.
   Each model must have a corresponding action. For example, an import action must be configured to import data into a model.
- Manage certificate-based authentication with certificates issued by Anaplan or a certificate authority.
   If the certificate is issued by Anaplan, the administrator must install the certificate on the machine that hosts the Secure Agent. If the certificate is issued by a certificate authority, the administrator must perform the following tasks:
  - 1. Get the certificate from a certificate authority.
    - Extract the private key and public certificate.
  - 2. Create a Java KeyStore using the private key and public certificate.

As a user, you can also perform the following tasks:

- Verify your Informatica Connection properties, such as the Runtime Environment and the absolute path to a directory, which you can use as your output directory for Export.
- To use non-English characters, set the following environment variable: JAVA\_TOOL\_OPTIONS=-Dfile.encoding=UTF8
- Create a directory or file for the Anaplan actions.
   The following table describes the directory or file for the Anaplan actions:

Anaplan Action	Description
Import	A directory to hold the files you import
Export	A directory to hold the files you export
Delete	A csv file with at least one row and one column of data
Process	A csv file with at least one row and one column of data

#### Get the Certificate from a Certificate Authority

You can submit a certificate request to obtain the certificate from a certificate authority. The certificate authority issues the public certificate and the private key as a single file or as two separate files. If you obtain the public certificate and private key in a single file, you must extract and save both files separately.

Once you obtain the certificate, it is under your control and Anaplan Inc. is not responsible for keeping it secure. You should not share your private key with anyone under any circumstances.

#### Extract Private key and Public Certificate

If you obtain the public certificate and private key in a single file, use the openssl command to extract and save both files separately in PEM format.

Ensure that the public certificate file begins with "----BEGIN CERTIFICATE----" and ends with "----END CERTIFICATE----". Delete any text present before "----BEGIN CERTIFICATE----" and after "----END CERTIFICATE----".

Run the following commands to extract the public certificate and private key:

```
openssl pkcs12 -in Client_certificate.p12 -nokeys -out CERTIFICATE.pem
openssl pkcs12 -in Client certificate.p12 -nocerts -out PRIVATE KEY.pem -nodes
```

#### Create a Java KeyStore

Storing sensitive information like the private key in the file system can be insecure. Use a Java KeyStore to protect the private key and certificate with a KeyStore password.

Perform the following steps to create a Java KeyStore:

 Run the following command to create a pkcs12 bundle called keystore\_bundle.p12 using the private key and public certificate:

```
$ openssl pkcs12 -export -in <CERTIFICATE.pem> -inkey <PRIVATE_KEY.pem> -out
keystore_bundle.p12 -name <KEYSTORE_ALIAS> -CAfile <CERTIFICATE.pem> -caname root
```

The following table describes the openssl arguments:

Arguments	Description
CERTIFICATE.pem	The public certificate.
PRIVATE_KEY.pem	The private key.
keystore_bundle.p12	The generated pkcs12 formatted file.
KEYSTORE_ALIAS	The alias of your public certificate in the pkcs12 bundle.

You are prompted to create the KeyStore password. Enter a password of your choice. This password is required to create the Java KeyStore.

Run the following command to create the Java KeyStore called my keystore.jks using the pkcs12 file:

```
$ keytool -importkeystore -deststorepass <KEYSTORE-PASSWORD> -destkeystore
my_keystore.jks -srckeystore keystore_bundle.p12 -srcstoretype PKCS12
```

The following table describes the keytool arguments:

Arguments	Description
my_keystore.jks	The generated Java KeyStore file.
keystore_bundle.p12	The pkcs12 bundle.

You are prompted for the  ${\tt KEYSTORE-PASSWORD}.$  Enter the KeyStore password.

The generated .jks file contains the KeyStore that securely holds the private key and the certificate.

### Rules and Guidelines for Anaplan V2 Connector

- You cannot use comma-separated values, tab-separated values, or other formats with Anaplan V2 Connector.
- You must use double-quotation mark (") as the text-delimiter.

- You must populate all column names. Empty columns are not supported. For example, tabular single-column CSV exports of Lists contain an empty cell, which can be replaced with a "\_DUMMY" or any other string placeholder. In the Informatica field-mapper, this can be addressed.
- Import row counts in Anaplan synchronization tasks return zero. Export row counts are reported correctly. To check Import row counts, check the session.log file from the Monitor page.
- Note that Anaplan tested with a 500 MB file using 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
- To increase the field buffer size and Secure Agent memory, see Informatica documentation.
- You can perform model-to-model import in a process operation and not in an import operation.
- A process operation generates a dump file only if it contains an import action.
- A process is limited to any combination of model-to-model import actions and/or delete actions.
- When you use API based field mapping, ensure that the import action does not contain custom date formats.
- You must enter alphanumeric characters in Anaplan column names and field values. Data Integration
  does not support names that contain spaces or the followingspecial characters `~! @ # \$ % ^ & \* () + = <
  >[] {} ?.
- The data being transferred must contain ASCII characters. See the list at https://en.wikipedia.org/wiki/ASCII#ASCII\_printable\_code\_chart
- You must refrain from using numeric column headers or column headers starting with numbers in order to avoid confusion with the "\_NUMHDR\_" tags

**Note:** The Anaplan V2 Connector uses the values for Column Separator and Text Delimiter that are set in the model through the File Import Data Source Definition.

# Behavioral Difference Between Anaplan and Anaplan V2 Connector

The following table describes the behavioral differences between Anaplan Connector and Anaplan V2 Connector.

Anaplan Operation	Anaplan Connector	Anaplan V2 Connector
Export	Export (Success Scenario) - Success Rows: 1, Failure Rows: 0 Export (Failure Scenario) - Success Rows: 0, Failure Rows: Actual count of rows failed	Export (Success Scenario) - Success Rows: Actual count of rows exported, Failure Rows: 0 Export (Failure Scenario) - Success Rows: 0, Failure Rows: Actual count of rows failed Export (Warning Scenario) - Success Rows: Actual count of rows exported, Failure Rows: Actual count of rows failed
Import	Import (Success Scenario) - Success Rows: Actual count of rows imported, Failure Rows: 0 Import (Failure Scenario) - Success Rows: Actual count of rows imported, Failure Rows: Actual count of rows failed	Import (Success Scenario) - Success Rows: 0, Failure Rows: 0 Import (Failure Scenario) - Success Rows: 0, Failure Rows: 0
Delete	Delete (Success Scenario) - Success Rows: 0, Failure Rows: 0 Delete (Failure Scenario) - Success Rows: 0, Failure Rows: 0	Delete (Success Scenario) - Success Rows: 1, Failure Rows: 0 Delete (Failure Scenario) - Success Rows: 0, Failure Rows: 0
Process	Process (Success Scenario) - Success Rows: 0, Failure Rows: 0 Process (Failure Scenario) - Success Rows: 0, Failure Rows: 0	Process (Success Scenario) - Success Rows: 1, Failure Rows: 0 Process (Failure Scenario) - Success Rows: 0, Failure Rows: 0

#### CHAPTER 2

# **Anaplan V2 Connections**

Create an Anaplan V2 connection to connect to Anaplan so that the agent can read data from or write data to Anaplan. You can use Anaplan V2 connections to specify sources and targets in synchronization tasks, mappings, and mapping tasks.

You can create an Anaplan V2 connection on the Connections page. Use the connection when you create synchronization tasks, mappings, and mapping tasks.

## Anaplan V2 connection properties

When you set up an Anaplan V2 connection, you must configure the connection properties.

The following table describes the Anaplan V2 connection properties:

Connection property	Description
Connection Name	A name for the Anaplan V2 connection. This name must be unique within the organization.
Description	Description of the Anaplan V2 connection.
Туре	Type of connection. Select Anaplan V2.
Runtime Environment	The name of the runtime environment that contains the Secure Agent that you want to run the tasks.
Auth Type	The type of authentication that the connector must use to log in to Anaplan.
	Select the authentication method that the connector must use to login to the Anaplan. You can select the following authentication types:
	<ul> <li>Basic Auth. Requires Anaplan account username and password to connect to Anaplan.</li> <li>Cert Auth. Requires Certificate Authority (CA) to obtain an authentication token.</li> <li>OAuth Device Flow. Requires an OAuth 2.0 client credential to authenticate user data across apps.</li> <li>Default is Basic Auth.</li> </ul>
Username	The user name to log in to Anaplan. For example, firstname.lastname@anaplan.com.  Note: Do not leave this field blank. Even though you want to establish a connection using certificate based authentication, you need to enter a random value or string in this field.
Password	Password that is associated with the user name that is specified in the Username property.

Connection property	Description
Certificate Path Location	Path to the Anaplan authentication certificate. Certificate Path Location is required only if you want to configure a connection with the certificate issued by Anaplan and you want to use API version 1.3.
	This implies that the Certification Path Location is required only if Auth type = Cert Auth, Major Version = 1, and Minor Version = 3.
Workspace ID	The name or ID of the workspace.  To fetch the ID, open the Anaplan model and copy the value after <code>selectedWorkspaceId= from the URL</code> .
Model ID	The name or ID of the model.  To fetch the ID, open the Anaplan model and copy the value after selectedModelId= from the URL.
API Base URL	Enter the API Base URL. For example, https://api.anaplan.com
Auth URL	Specifies the URL for the authentication service required to generate the authentication taken.  For example, https://usla.app.anaplan.com
API Major Version	The Anaplan API version has two parts: Major Version and Minor Version.  Example: For API version 1.3, the Major Version is 1 and the Minor Version is 3.  By default, the API Major Version is set to 1.  To use certificate issued by Anaplan, select 1. API version 1.x supports certificate issued by Anaplan.  To use certificate issued by a certificate authority, select 2. API version 2.x supports certificate issued by a certificate authority.
API Minor Version	By default, the API Minor Version is set to 3 Select 3 if you want to use API version x.3. For example, version 1.3 - Select 0 if you want to use API version x.0. For example, version 2.0
Max Task Retry Count	By default, the Max Task Retry Count is set to 2.  If you select a greater value, it may slow down the synchronization tasks.
Error Dump Path Location	The absolute path of the error file on the Secure Agent machine.  The Secure Agent creates a sub-folder in the Error Dump Path Location for each process operation.
Use API Based Metadata	You can import API based metadata from Anaplan and use API based field mapping instead of File based field mapping in a synchronization task. When you import API based metadata, Anaplan V2 Connector reads the column header information from Anaplan APIs directly without referring to files in Anaplan.
KeyStore Path Location	Path to the JAVA KeyStore file on the system with the Secure Agent.  Note: The KeyStore Path Location, KeyStore Alias, and Keystore Password is required only if you want to configure a connection with the certificate issued by a certificate authority and you want to use API version 2.0.
KeyStore Alias	Alias of the certificate saved in the KeyStore file.
Keystore Password	Password for the certificate alias in the KeyStore file.

Connection property	Description
ClientId	Required for OAuth Device Flow. The client identifier issued to the client during the application registration process.
Token	Required for OAuth Device Flow. The refresh token is used to get new access tokens.  You can select one of the following options: Rotatable. Uses the refresh token once during the lifespan. Non-rotatable. Uses the refresh token several times. The non-rotatable token does not expire.

# **Configuring Proxy Settings**

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

**Note:** Contact your network administrator for the correct proxy settings. For more information see the Knowledge Base Article: Configure proxy server settings through JVM options.

# Configuring Anaplan V2 Connection with Basic Authentication

Perform the following steps to configure an Anaplan V2 connection with basic authentication:

- 1. Log in to your Data Integration account.
- 2. Click Administrator > Connections.

The Connections page appears.

3. Click New Connection.

The New Connection page appears.

4. In the Connection Details section, configure the following fields:

Property	Description
Connection Name	Name of the Anaplan V2 connection.
Description	Description of the connection.
Туре	Select Anaplan V2.

5. In the Anaplan V2 Connection Properties section, configure the following fields:

Property	Description
Runtime Environment	Select a runtime environment.
Auth Type	Select Basic Auth.
Username	User name of the Anaplan account.
Password	Password of the Anaplan account.
Workspace ID	Enter the Workspace ID.
Model ID	Enter the Model ID.
API Base URL	Set the Anaplan API URL to <a href="https://api.anaplan.com">https://api.anaplan.com</a> .
Auth URL	Specifies the URL for the authentication service required to generate the authentication taken.  For example, https://usla.app.anaplan.com
API Major Version	Set the value to 1.
API Minor Version	Set the value to 3.
Max Task Retry Count	Set the value to 2.

- 6. Click Test Connection to determine if the connection to the Anaplan is successful.
- 7. Click Save to save the connection

### Configuring Anaplan V2 Connection with Certificate-Based Authentication

#### Certificate Issued by Anaplan

Perform the following steps to configure an Anaplan V2 connection with the certificate issued by Anaplan:

- 1. Log in to your Data Integration account.
- 2. Click Administrator > Connections.
  - The Connections page appears.
- 3. Click New Connection.
  - The New Connection page appears.

4. In the Connection Details section, configure the following fields:

Property	Description
Connection Name	Name of the Anaplan V2 connection.
Description	Description of the connection.
Туре	Select Anaplan V2.

5. In the Anaplan V2 Connection Properties section, configure the following fields:

Property	Description
Runtime Environment	Select a runtime environment.
Auth Type	Select Cert Auth.
Certificate Path Location	Enter the path for the Anaplan certificate.  You can download an Anaplan certificate. Follow the instructions published at <a href="https://community.anaplan.com/anapedia/getting-started/end-user/certificates">https://community.anaplan.com/anapedia/getting-started/end-user/certificates</a> . Once you download the Anaplan certificate, the certificate is under your control and Anaplan Inc. is not responsible for keeping it secure. Data Integration assumes that the location of files (including certificates) that are referenced is on a directory that the Secure Agent can access.
Workspace ID	Enter the Workspace ID.
Model ID	Enter the Model ID.
API Base URL	Set the Anaplan API URL to https://api.anaplan.com.
Auth URL	Specifies the URL for the authentication service required to generate the authentication taken.  For example, https://usla.app.anaplan.com
API Major Version	Set the value to 1.
API Minor Version	Set the value to 3.
Max Task Retry Count	Set the value to 2.
Error Dump Path Location	Enter the location of the error file on the Secure Agent machine.
Use API Based Metadata	Select the checkbox if you want to use API based field mapping instead of File based field mapping in a synchronization task.

- 6. Click **Test Connection** to determine if the connection to Anaplan is successful.
- 7. Click Save to save the connection.

#### Certificate Issued by a Certificate Authority

You can configure an Anaplan connection after the organization administrator performs the following tasks:

- 1. Get the certificate from the certificate authority.
  - Extract the private key and public certificate.
- 2. Create a Java KeyStore using the private key and public certificate.

For more information, see "Administration of Anaplan V2 Connector" on page 6.

Perform the following steps to configure an Anaplan connection with the certificate issued by a certificate authority:

- 1. Log in to your Data Integration account.
- 2. Click Administrator > Connections.

The New Connections page appears.

3. In the Connection Details section, configure the following fields:

Property	Description
Connection Name	Name of the Anaplan V2 connection.
Description	Description of the connection.
Туре	Select Anaplan V2.

4. In the AnaplanV2 Connection Properties section, configure the following fields:

Property	Description
Runtime Environment	Select a runtime environment.
Auth Type	Select Cert Auth.
Workspace ID	Enter the Workspace ID.
Model ID	Enter the Model ID.
API Base URL	Set the Anaplan API URL to <a href="https://api.anaplan.com">https://api.anaplan.com</a> .
Auth URL	Specifies the URL for the authentication service required to generate the authentication taken.  For example, https://usla.app.anaplan.com
API Major Version	Set the value to 2.
API Minor Version	Set the value to 0.
Max Task Retry Count	Set the value to 2.
Error Dump Path Location	Enter the location of the error file on the Secure Agent machine.

Property	Description
Use API Based Metadata	Select the checkbox if you want to use API based field mapping instead of File based field mapping in a synchronization task.
KeyStore Path Location	Path to the JAVA KeyStore file on the system with the Secure Agent.
KeyStore Alias	Alias of the certificate saved in the KeyStore file.
Keystore Password	Password for the certificate alias in the KeyStore file.

- 5. Click **Test Connection** to determine if the connection to Anaplan is successful.
- 6. Click **Save** to save the connection.

#### CHAPTER 3

# Synchronization Tasks with Anaplan V2 Connector

Use a 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.

# Anaplan V2 Sources in Synchronization Tasks

You can use an Anaplan V2 object as a single source in a synchronization task. You can configure Anaplan V2 source properties on the Source page of the Synchronization Task wizard.

The following table describes the Anaplan V2 source properties that you can configure in a source transformation:

Property	Description
Connection	Name of the source connection.
Source Type	Type of the source object. Select single object.
Source Object	Name of the source object. Select the source object name.
Display source fields in alphabetical order	Displays source fields in alphabetical order instead of the order returned by the source system.

#### Rules and guidelines for Anaplan V2 sources

When you perform an export operation, ensure that the Anaplan module does not contain multiple lines of text in a single cell

# Anaplan V2 Targets in Synchronization Tasks

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

To import data to Anaplan, you must configure the Anaplan V2 target properties on the Target page of the Synchronization Task wizard.

Anaplan V2 Connector uses Gzip compression to compress the files before importing files to Anaplan.

The following table describes the Anaplan V2 target properties:

Property	Description
Connection	Name of the target connection.
Target Object	Name of the target object.
Child Object	Name of the child 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, you can configure the advanced target properties. The advanced target properties appear on the **Schedule** page of the Synchronization Task wizard. The following table describes the Anaplan advanced target properties:

Property	Description
Chunk Size	Sends the data in chunks or batches. For example, if you specify 1 MB as the chunk size, the Secure Agent transfers 1 MB of data at a time until the transfer is complete.
Upload Only Import	Select the check box to configure a synchronization task to only upload a file and not invoke an action.

## Synchronization Task Example

You can create a synchronization task to write data to Anaplan. You can use the Anaplan V2 connector to read data from a flat file and write data to Anaplan.

Perform the following steps to read data from a flat file and write data to Anaplan.

- Select Data Integration from the menu.
   The Data Integration Home page appears.
- 2. Click New > Tasks > Synchronization Task to create a synchronization task.

3. On the **Definition** tab, configure the following fields:

Field	Description
Task Name	Name of the synchronization task.
Description	Description of the synchronization task. Maximum length is 255 characters.
Task Operation	Select Insert.

- 4. Click Next.
- 5. On the **Source** tab, configure the following fields:

Field	Description
Connection	Select the source connection.
Source Type	Select <b>Single</b> .
Source Object	Select the .csv file that you want to import.

- 6. Click Next.
- 7. On the Target tab, configure the following fields:

Field	Description
Connection	Select an Anaplan V2 connection.
Target Object	Select the Anaplan Import action.

- 8. Click Next.
- 9. On the **Data Filters** tab, set the filter conditions. If you do not set a filter condition, all rows are processed for the task.
- 10. Click Next.
- 11. On the **Field Mapping** tab, map all the fields of in the flat file connection to the relevant fields in Anaplan. The Anaplan V2 connector writes the mapped source data to Anaplan.
- 12. Click Next.
- 13. 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. Additionally, you can configure the following advanced scheduling options:
  - Specify the Chunk Size for Imports or Exports. This option enables you to send data in chunks or batches.
  - b. Enable the **Upload Only** option to upload a file without invoking an action.
- 14. Click Finish. To run the task, click Run.

On the **Monitor** tab, you can monitor the status of the task.

#### CHAPTER 4

# Mappings and mapping tasks with Anaplan Connector

Use a mapping to define the data flow logic between the source and the target. You can also add other transformations in the mapping to transform the data.

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

# Anaplan V2 sources in mappings and mapping tasks

To read data from Anaplan, configure an Anaplan V2 object as a Source transformation in a mapping. You can configure a Source transformation to represent a single Anaplan V2 source.

Specify the name and description of the Anaplan V2 source. Configure the source properties for the source object.

The following table describes the Anaplan V2 source properties that you can configure in a Source transformation:

Property	Description
Connection	Name of the source connection.
Source Type	Type of the source object. Select Single Object or Parameter.
Source Object	Name of the source object. Select the source object.

The following table describes the advanced properties of Anaplan V2 sources:

Advanced Property	Description
Tracing Level	Sets the amount of detail that appears in the log when you run a mapping to read from the source.
	Use the following tracing levels: - Terse - Normal - Verbose Initialization - Verbose Default is normal.

# Anaplan targets in mappings and mapping tasks

To write data to Anaplan, configure an Anaplan V2 object as a Target transformation in a mapping. You can configure a Target transformation to represent a single Anaplan V2 target.

Specify the name and description of the Anaplan V2 target. Configure the target properties for the target object.

The following table describes the Anaplan V2 target properties that you can configure in a Target transformation:

Property	Description	
Connection	Name of the target connection.	
Target Type	Type of the target object. You can select Single Object or Parameter.	
Object	Name of the target object.	
Operation	The target operation. Select the insert operation to write data to the target object.	

The following table describes the advanced target properties for Anaplan Connector:

Property	Description
Chunk Size	The data size, in MB units, that the Secure Agent writes in a batch to an Anaplan target.  For example, if you specify 1 MB as the chunk size, the Secure Agent transfers 1 MB of data at a time until the transfer is complete.  The batch size helps when you want to write large amounts of data. The agent performs the configured insert, update, or delete operation based on the batch size.
Upload Only Import	Defines the method that Anaplan uses to upload data or a file.
	Enable this property so that Anaplan exclusively runs the import action to upload your data or file without triggering other processes concurrently.
	If you do not select this property, Anaplan uses the standard procedure to upload your data or file.
Success File Directory	Directory for the Anaplan success rows file.
	Specify a directory on the Secure Agent machine.  By default, Data Integration writes the success rows file to the following directory: <secure agent="" directory="" installation="">/apps/Data_Integration_Server/data/success</secure>
Error File Directory	Directory for the Anaplan error file.  Specify a directory on the Secure Agent machine.
	By default, Data Integration writes the error rows file to the following directory: <secure agent="" directory="" installation="">/apps/Data_Integration_Server/data/error</secure>
Forward Rejected Rows	Determines whether the transformation passes rejected rows to the next transformation or drops rejected rows. By default, the mapping task forwards rejected rows to the next transformation.
	If you select the Forward Rejected Rows option, the Secure Agent flags the rows for reject and writes them to the reject file.
	If you do not select the Forward Rejected Rows option, the Secure Agent drops the rejected rows and writes them to the session log file. The Secure Agent does not write the rejected rows to the reject file.

# INDEX

A	Informatica Intelligent Cloud Services web site $\underline{4}$
administration certificate authority 7 Java KeyStore 8 private key 7 public certificate 7 Anaplan V2 connection properties 11 connections 11	maintenance outages <u>5</u> mappings Anaplan V2 target properties <u>22</u>
connector <u>6</u> Synchronization task <u>18</u> Target transformation <u>22</u> AnaplanV2 targets in mappings <u>22</u>	S status Informatica Intelligent Cloud Services 5 synchronization task example 19
C	sources <u>18</u> targets <u>19</u> system status 5
certificate-based authentication Anaplan certificate 14 certificate authority 16	T.
Cloud Application Integration community URL 4 Cloud Developer community URL 4 configuration basic authentication 13 certificate-based 14 connections Anaplan V2 11	Target transformation Anaplan V2 properties 22 targets Anaplan V2 in mappings 22 trust site description 5
connector administration $\underline{6}$ overview $\underline{6}$	U upgrade notifications $\underline{5}$
Data Integration community URL 4	W web site 4
I	
Informatica Global Customer Support contact information $\underline{5}$	