Informatica®

Informatica® Cloud Data Integration

Microsoft Excel Connector

Informatica Cloud Data Integration Microsoft Excel Connector
October 2022

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Preface

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

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CHAPTER 1

Microsoft Excel Connector

You can use Microsoft Excel Connector to read data from a Microsoft Excel source and integrate data with other applications, databases, and flat files.

You can use Microsoft Excel source objects as sources in synchronization tasks, mappings, and mapping tasks. When you run a synchronization task or a mapping task, the Secure Agent uses the Microsoft Excel source object to perform the specified operation and read data from the Microsoft Excel source.

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

Note: Microsoft Excel Connector supports files created in version Excel 2007 and onwards.

Microsoft Excel Connector assets

Create assets in Data Integration to integrate data using Microsoft Excel Connector assets.

When you use Microsoft Excel Connector, you can include the following Data Integration assets:

- Mapping
- Mapping task
- Synchronization task

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

The following table lists the object and task operations that Microsoft Excel Connector supports:

Object	Read	Insert	Update	Upsert	Delete	Data Preview	Look Up
Worksheet	Yes	NA	NA	NA	NA	Yes	NA

Microsoft Excel Connector Example

You are a business analyst and you want to import customer details from a Microsoft Excel file to Tableau and analyze the data.

You can use the Microsoft Excel Connector to connect to the Microsoft Excel file and read the data. You can create a synchronization task or a mapping task in Data Integration to read data from the Microsoft Excel file.

After you read data from the Microsoft Excel file, you can reconcile and analyze the data, generate reports, or make decisions by using Tableau.

Administration of Microsoft Excel Connector

As a user, you can use Microsoft Excel Connector after the organization administrator performs the following tasks:

- Install Microsoft Excel Connector.
- Increase the Secure Agent memory to overcome memory issues that occur when you read from a file whose file size exceeds 1 GB.

CHAPTER 2

Microsoft Excel Connection

Create a Microsoft Excel connection to connect to a Microsoft Excel source and read data from it. You can specify the Microsoft Excel source in mappings, mapping tasks, or synchronization tasks.

You can create a Microsoft Excel source connection on the **Connections** page. Use the connection when you create a synchronization task or a mapping task.

Microsoft Excel connection properties

When you set up a Microsoft Excel connection, you must configure the connection properties.

The following table describes the Microsoft Excel connection properties:

Connection property	Description
Connection Name	Name of the Microsoft Excel connection.
Description	Description of the connection. The description cannot exceed 765 characters.
Type	Type of connection. Select **Microsoft Excel** source from the list.
Runtime Environment	The name of the runtime environment where you want to run the tasks.
Folder URI	The directory that contains the Microsoft Excel file. The Microsoft Excel file must be located on the same machine on which the Secure Agent runs.
TreatFirstRowAsHeader	Specifies whether the first row in the file is a header row.
Filename	The name of the Microsoft Excel file. **Note:** You must add the `.xlsx` extension to the file name.

CHAPTER 3

Synchronization Tasks with Microsoft Excel

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 Excel Sources in Synchronization Tasks

You can use a single Microsoft Excel source object in a synchronization task.

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

The following table describes the Microsoft Excel source properties:

Property	Description
Connection	Name of the source connection.
Source Type	Select Single.
Source Object	Name of the source object. The source object corresponds to the worksheet present in the Microsoft Excel file used for creating the connection.

Microsoft Excel Source Synchronization Task Example

You want to import prospective inpatient payment details from a Microsoft Excel file to analyze the data.

Configure a synchronization task with the insert operation and configure the following objects:

Source

The source object for a synchronization task corresponds to worksheets present in the Microsoft Excel file used for creating a connection. Use the Microsoft Excel source connection to connect to the Microsoft Excel file and read data from the worksheet.

Target

Use a .csv file as the target object in the synchronization task. The target object file must contain the tables you select in the source object.

Mapping

Map the primary fields of the source object to the flat file target object.

Note: When you run the synchronization task, the Secure Agent writes the retrieved tables to the target `.CSV` file.

CHAPTER 4

Mappings and Mapping Tasks with Microsoft Excel

Use the Data Integration Mapping Designer to create a mapping. When you create a mapping, you configure a source to represent a single Microsoft Excel 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 source and target along with the required transformations before the Secure Agent writes data to the target. When you create a mapping task, select the mapping that you want to use. Use the mapping task wizard to create a mapping task. The mapping task processes data based on the data flow logic you define in the mapping.

Microsoft Excel Mapping Task Example

You want to import data from a Microsoft Excel file to analyze the data.

Configure a mapping task to use the insert operation. You use the following objects in the Microsoft Excel mapping:

Source object

The source object for a mapping task is a worksheet. Use the Microsoft Excel connection to connect to a Microsoft Excel file and read data from the Microsoft Excel file. The worksheet 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 the mapping task is a flat file.

Mapping

Map the fields of the Microsoft Excel Worksheet source to the flat file target.

The following image shows the Microsoft Excel mapping:

When you run the mapping, the Secure Agent writes the data to the flat file based on the fields you mapped in the mapping task.

APPENDIX A

Data Type Reference

Data Integration uses the following data types in mappings and synchronization tasks with Microsoft Excel:

Microsoft Excel Native Data Types

Microsoft Excel data types appear in the Source and Target transformations when you choose to edit metadata for the fields.

Transformation Data Types

Set of data types that appear in the transformations. They are internal data types based on ANSI SQL-92 generic data types, which the run-time environment uses to move data across platforms. Transformation data types appear in all transformations in mappings and synchronization tasks.

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

Microsoft Excel and Transformation Data Types

The following table describes the data types that Data Integration supports for Microsoft Excel sources:

Microsoft Excel Data Type	Transformation Data Type	Range and Description for the Transformation Data Type
STRING	String	1 to 104,857,600 characters

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