



Informatica®

Informatica® Data Integration - Free & PayGo  
February 2025

# Getting Started

Informatica Data Integration - Free & PayGo Getting Started  
February 2025

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# Preface

Refer to *Getting Started* for information about how to begin using Informatica Cloud® Data Integration. *Getting Started* explains how to configure a runtime environment, connect Data Integration to your system, and begin a project.

## 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 <https://docs.informatica.com>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at [infa\\_documentation@informatica.com](mailto:infa_documentation@informatica.com).

### Informatica Intelligent Cloud Services web site

You can access the Informatica Intelligent Cloud Services web site at <http://www.informatica.com/cloud>. 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:

<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:

<https://marketplace.informatica.com/>

## 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 <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at [KB\\_Feedback@informatica.com](mailto: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 [Informatica Intelligent Cloud Services Status](#) 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 <https://www.informatica.com/services-and-training/support-services/contact-us.html>.

# CHAPTER 1

## Getting started with Data Integration

You can create a data integration project in just a few steps.

### Step 1. Check system requirements

Be sure you're using a compatible browser when you're designing your projects, and check the Informatica Intelligent Cloud Services Product Availability Matrix for operating systems, databases, and other systems that Data Integration supports.

### Step 2. Configure a runtime environment

A runtime environment is the execution platform for running tasks. It consists of one or more Secure Agents. A Secure Agent is a lightweight program that runs tasks and enables secure communication between your organization and Informatica Intelligent Cloud Services.

You can use the following types of runtime environments:

#### **Informatica Cloud Hosted Agent**

When you want to access data in an SaaS environment, use the Informatica Cloud Hosted Agent. The Hosted Agent runs within the Informatica Intelligent Cloud Services hosting facility. If you choose this option, there is nothing to install.

The Hosted Agent can run tasks that use certain connectors. To find out if the connector that you use supports the Hosted Agent, see the help for that connector.

#### **Secure Agent Groups**

When you need to access data on-premises or when you want to access SaaS data without using the Hosted Agent, use a Secure Agent group. A Secure Agent group contains one or more Secure Agents. The agents in a group run within your network or in a cloud computing services environment like Microsoft Azure.

You can install one Secure Agent on a physical or virtual machine. Each agent that you install is added to its own group by default. To balance workloads and improve scalability, you can add multiple agents to a group.

To create a Secure Agent group on Microsoft Azure, click **Configure a runtime environment** on the Data Integration **Home** page. To create a Secure Agent group locally or in a different cloud computing services environment, download and install the Secure Agent from the **Runtime Environments** page in the Administrator service.

### Step 3. Create a connection

Before you can use Data Integration to run data integration tasks, you need to create a connection. When you configure the connection, you choose the connector that enables the exchange of data between Data Integration and the source and target objects. Data Integration includes a wide variety of built-in connectors.

For example, if you want to create a task that uses Salesforce data, you create a Salesforce connection. The Salesforce connection uses the Salesforce connector to enable the exchange of data between Salesforce and Data Integration.

You can create a connection when you configure a mapping or task in Data Integration. You can also create connections on the **Connections** page in the Administrator service.

### Step 4. Create your project and assets

Create a project to contain your data integration assets. You can also create folders within a project to organize your assets. Create projects and folders on the **Explore** page in Data Integration.

After you set up your project and folders, you're ready to create your assets. Assets include the following objects:

- Mappings
- Tasks
- Taskflows
- Reusable components such as mapplets, shared sequences, and user-defined functions

To create an asset, in Data Integration, click **New** in the navigation menu on the left.

## CHAPTER 2

# System requirements

You can find information about system requirements in the Product Availability Matrix (PAM) for Informatica Intelligent Cloud Services.

The PAM indicates the versions of browsers, operating systems, databases, and other types of data sources and targets that a product release supports. You can access the PAM on Informatica Network at <https://network.informatica.com/community/informatica-network/product-availability-matrices/>.

## Enabling CORS in Internet Explorer 11

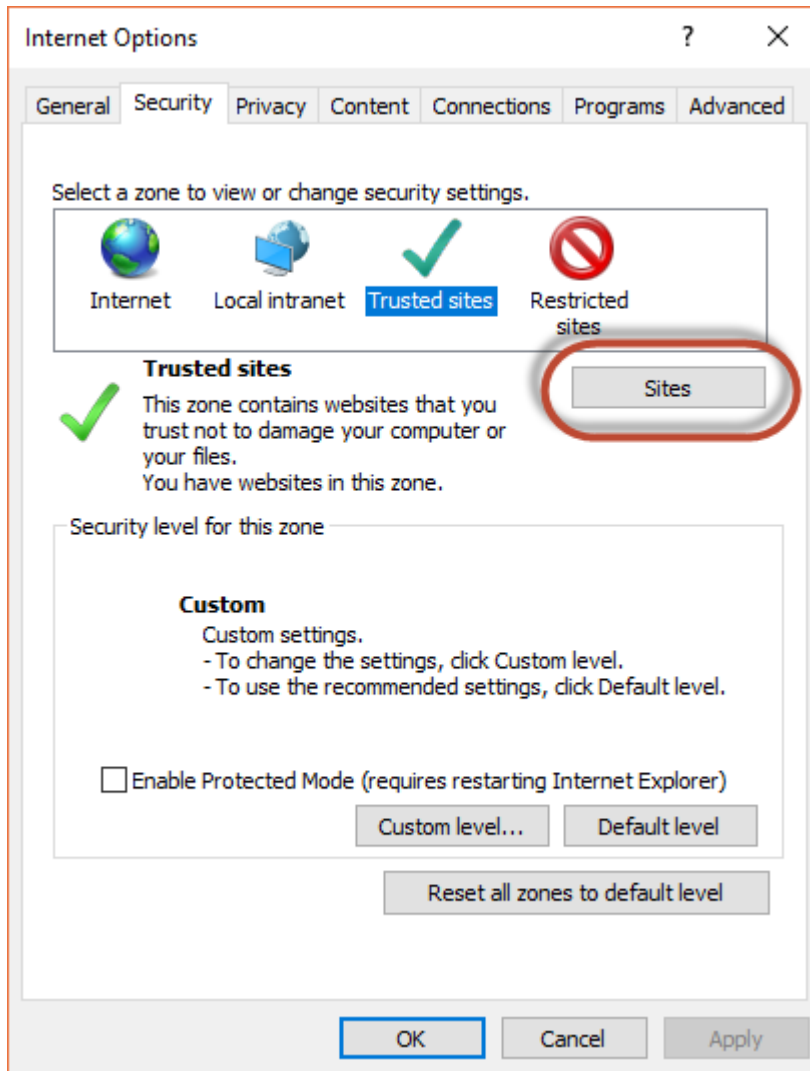
Informatica Intelligent Cloud Services requires that cross-origin support (CORS) be enabled in Internet Explorer 11. In Internet Explorer 11, CORS is not enabled by default.

**Note:** Some company security policies restrict the ability of users to enable CORS in a web browser. Before you update these settings, verify that your company or IT department allows you to change the CORS settings.

1. Open Internet Explorer 11.
2. On the **Tools** menu, select **Internet Options**.

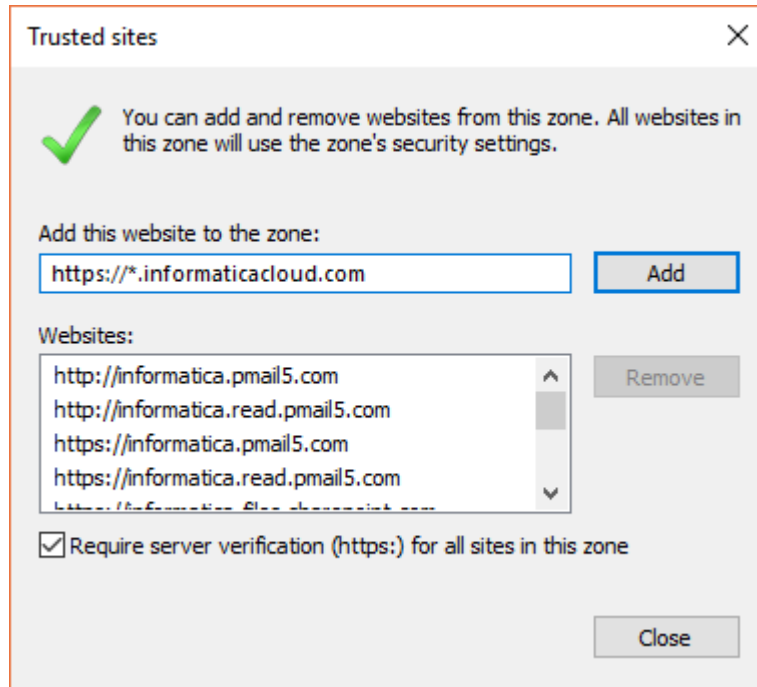


3. On the **Security** tab, click **Trusted sites**, and then click **Sites** as shown in the following image:



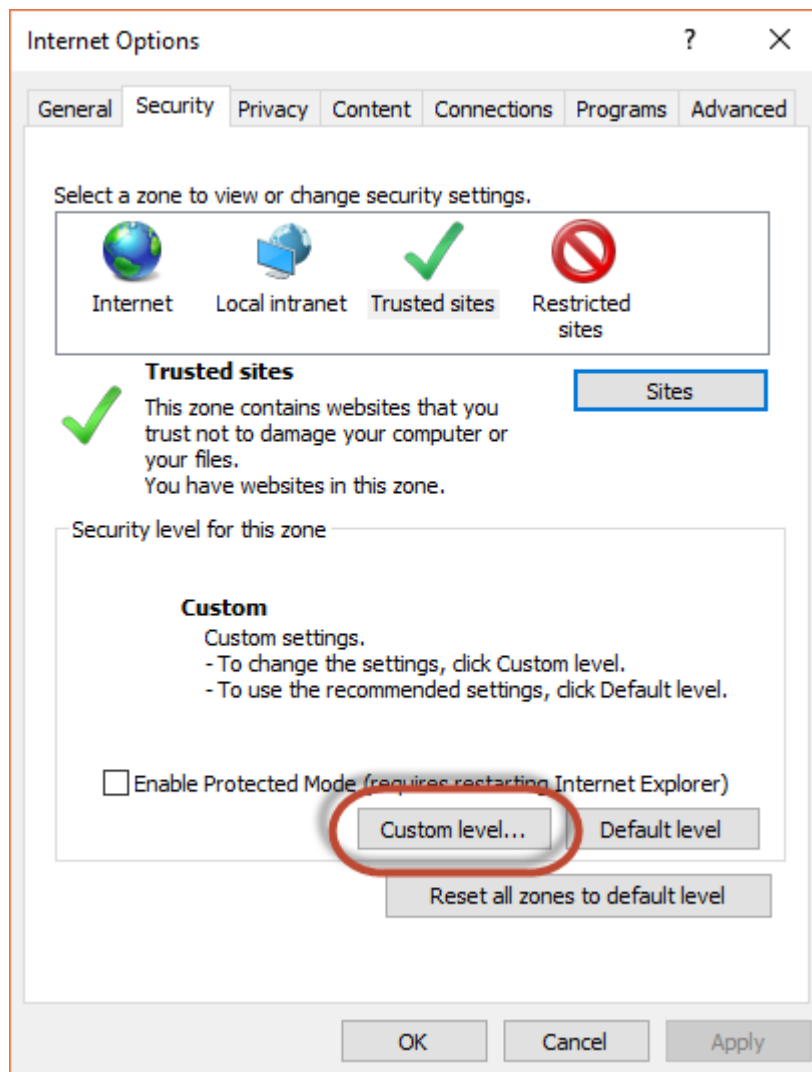
4. In the **Trusted Sites** dialog box, add the Informatica Intelligent Cloud Services domain to the zone, and click **Add**.

For example, the following image shows the domain `https://*.informaticacloud.com` added to the zone:

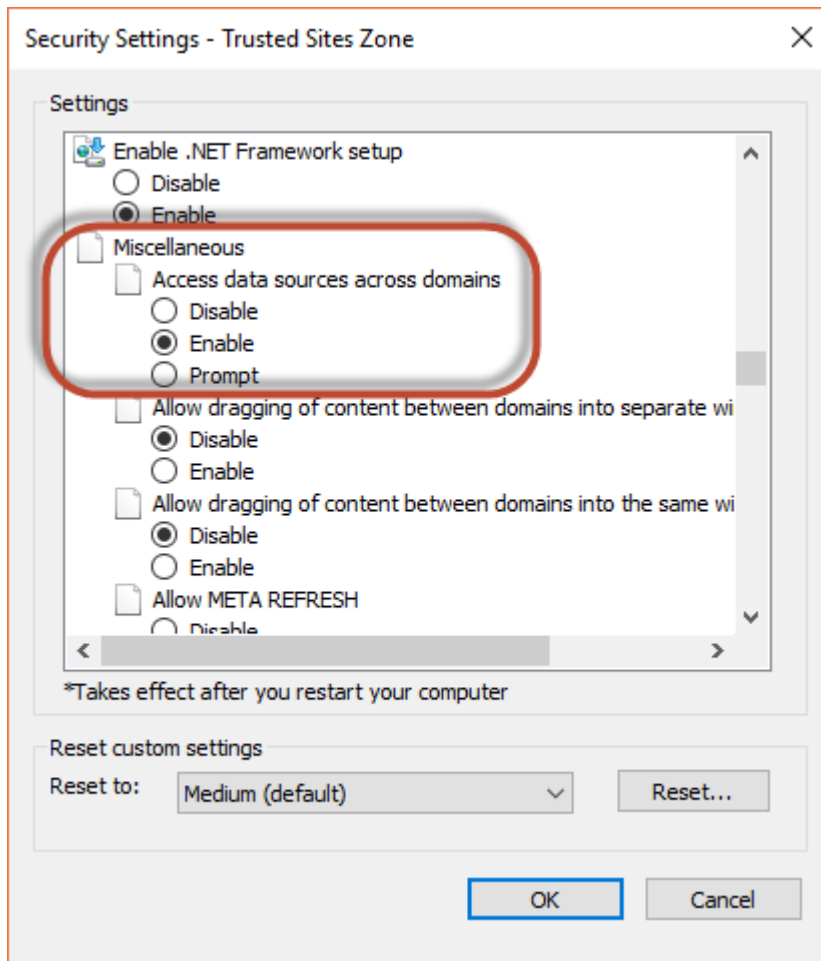


5. Click **Close**.

6. In the **Security level for this zone** area on the **Security** tab, click **Custom level** as shown in the following image:



7. In the **Security Settings - Trusted Sites Zone** dialog box, scroll down to the **Miscellaneous** heading, and enable **Access data sources across domains** as shown in the following image:



8. Click **OK**.
9. If prompted, confirm that you want to change the settings for the zone.
10. Click **OK**.
11. Restart Internet Explorer and re-open Informatica Intelligent Cloud Services.

## CHAPTER 3

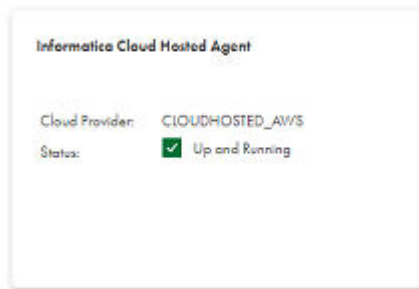
# Configuring a runtime environment

A runtime environment is the execution platform for running tasks. It consists of one or more Secure Agents. A Secure Agent is a lightweight program that runs tasks and enables secure communication between your organization and Data Integration.

You can access a runtime environment in any of the following ways:

### Use the Informatica Cloud Hosted Agent

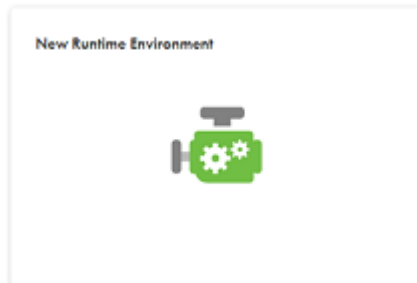
This is the simplest and quickest option. The Hosted Agent is included with every installation of Data Integration. Informatica hosts and maintains the Hosted Agent. You don't need to download, install, or configure anything. You can begin creating your connections and tasks immediately.



The Hosted Agent can only access data stored in the cloud, and it can only run a certain set of connectors in mappings. To see the list of connection types that you can use with the Hosted Agent, see *Connections*.

### Create a runtime environment from the Home Page

This is the second simplest method. The installation wizard in Data Integration does all the work behind the scenes to set up and configure a Secure Agent on AWS, Google Cloud, or Microsoft Azure.



The installation wizard creates a Secure Agent group with a single agent. To create a runtime environment using the installation wizard, click **Configure a runtime environment** on the **Home** page.

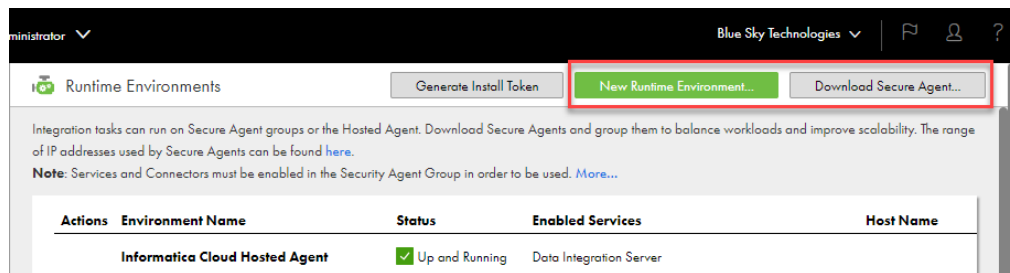
**Note:** Configuring a runtime environment from the **Home** page creates a virtual machine on Microsoft Azure. This will incur additional cost.

### Create a runtime environment manually

Create a runtime environment manually when you can't use the Hosted Agent or you're not installing an agent on AWS, Google Cloud, or Microsoft Azure.

Download and install a runtime environment manually if you need to do any of the following tasks:

- Run the agent on Windows.
- Install the Secure Agent on a local machine or a VM on a different cloud platform than AWS, Google Cloud, or Microsoft Azure.
- Access data sources that are behind a firewall.



Creating a runtime environment manually offers the greatest flexibility. For more information, see *Runtime environments*.

The remaining topics describe how to install on AWS, Google Cloud, and Microsoft Azure and how to install the runtime environment manually. If you're using the Hosted Agent, you can skip these topics and start creating your connections and tasks.

## Use AWS

The Data Integration installer can help you create a runtime environment on Amazon Web Services (AWS). The runtime environment you create is a Secure Agent group that contains one Secure Agent.

When you create a runtime environment on AWS, you create a new stack where the Secure Agent is deployed. You can create the stack in a new or existing virtual private cloud (VPC). The installer creates an Amazon Elastic Compute Cloud (EC2) instance within the VPC.

To create a runtime environment, you must have a subscription with AWS that includes create, modify, and delete privileges for the following resource types:

- EC2 instances
- Elastic IP addresses
- Elastic network interfaces
- Internet gateways
- Route tables

- Security groups
- Subnets
- VPCs

You must also have read and launch permissions for machine images.

1. On the **Home** page, click **Add a runtime environment**.
2. On the **Runtime Environments** page, click **New Runtime Environment**.
3. Select **Amazon Web Services**.
4. Click **Next**.
5. On the **Environment Configuration** page, copy the install token.  
The install token is valid for 24 hours and can't be reused.
6. Choose whether to create the runtime environment on an existing or new VPC.
7. Click **Continue Configuration in AWS**.  
The AWS **Sign in** screen opens in a new browser tab.
8. Sign in to your AWS account.  
The **Quick create stack** page opens.
9. In the **Stack name** area, enter a stack name.
10. In the **Parameters** area, under **Network Configuration**, configure the following properties based on whether you're using an existing VPC or a new VPC.
  - For an existing VPC, configure the following properties:

Property	Value
VPC ID	Select the ID for the VPC where you want to deploy the Secure Agent.
Subnet ID	Enter or select a subnet within the VPC.
Allowed Remote Access CIDR	Enter the CIDR block that specifies the IP addresses where the Secure Agent can be installed.  CIDR (Classless Inter-Domain Routing) is a method for allocating IP addresses. It configures a network rule to allow remote access to the Secure Agent. The "/x" portion of the address determines how many IP addresses are available in the subnet, for example: 108.124.81.10/32

- For a new VPC, configure the following properties:

Property	Value
Availability Zones	Select the availability zone for your region.
VPC CIDR	Enter the CIDR block that specifies the IP addresses where you want to create the VPC.

Property	Value
Subnet CIDR	Enter the CIDR block that specifies the IP addresses for the subnet in the availability zone that you selected.
Allowed Remote Access CIDR	Enter the CIDR block that specifies the IP addresses where the Secure Agent can be installed.

11. Under **Amazon EC2 Configuration**, configure the following properties:

Property	Value
Key Pair Name	Enter the name of an existing EC2 key pair to enable external access to the EC2 instance. Corresponding key pair files are required for SSH access to the server.
Instance Type	Select the instance type for the EC2 instance or accept the default. Default is m5.xlarge.
Enable Elastic IP Addressing	Choose whether to assign elastic IP addresses to the EC2 instance or accept the default. Default is no.

12. Under **Informatica Intelligent Data Management Cloud (IDMC) Account Details**, configure the following properties:

Property	Value
IDMC POD Master URL	Accept the default value for the IDMC POD Master URL. This is the URL that you use to access Informatica Intelligent Cloud Services. <b>Warning:</b> Changing this URL can result in stack deployment failure.
IDMC User Name	Enter your Informatica Intelligent Cloud Services user name.
IDMC User Token	Paste the install token that you copied. If you forgot to copy the install token, you can switch back to Informatica Intelligent Cloud Services and generate a new one.
Secure Agent Group Name	Accept the default value for the Secure Agent group name. This is the name of the runtime environment that you're creating.

13. Click **Create stack**.

It takes a few minutes to create the stack. Be sure to monitor the stack creation and address any issues that might occur.

When the stack is created successfully, the EC2 Instance status changes from CREATE\_IN\_PROGRESS to CREATE\_COMPLETE.

14. In Informatica Intelligent Cloud Services, on the **Environment Configuration** page, click **Finish**.

IICS creates your runtime environment and displays it on the **Runtime Environments** page.

It takes a few minutes for the Secure Agent services to start. When the Secure Agent is ready to use, the status changes from "Pending Environment Set Up" to "Up and Running." You might need to refresh the page to see the updated status.



## Troubleshooting deployment failure on AWS

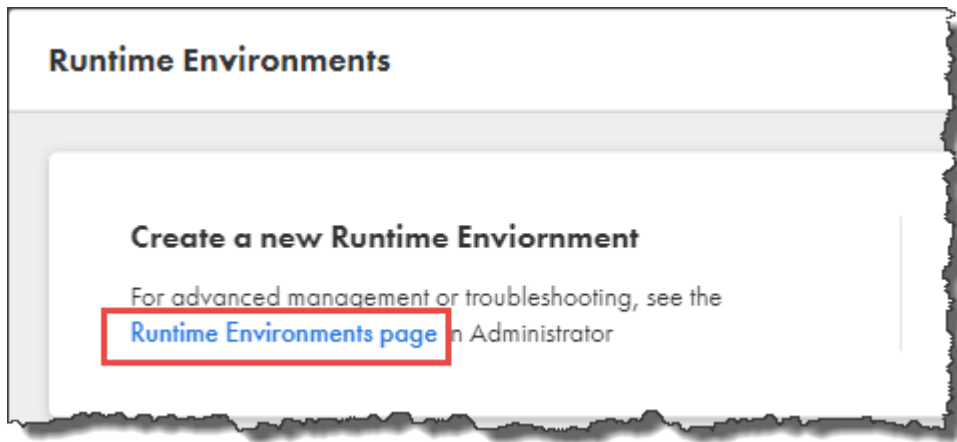
My runtime environment deployment was unsuccessful, but the runtime environment still appears on the Runtime Environments page. How can I delete it?

When you create a runtime environment on AWS and stack creation fails or the deployment process was unsuccessful, Data Integration creates an empty Secure Agent group. The empty Secure Agent group appears on the **Runtime Environments** page in Data Integration with the status "Pending Environment Set Up." It also appears on the **Runtime Environments** page Administrator with the status "No Secure Agents."

In Data Integration, the empty group is automatically removed from the page after 24 hours.

To remove the empty group in Administrator, complete the following steps:

1. On the **Runtime Environments** page in Data Integration, click the **Runtime Environments page** link, as shown in the following image:



The Administrator service opens in a new browser tab.

2. Switch to Administrator and locate the empty group on the **Runtime Environments** page.
3. In the **Actions** menu for the group, click **Delete**.

## Use Google Cloud

The Data Integration installer can create a runtime environment on Google Cloud for you, based on just a few properties that you enter on the configuration page.

**Note:** You must have a subscription with Google Cloud that includes permissions to deploy resources.

1. On the **Home** page, click **Add a runtime environment**.
2. On the **Runtime Environments** page, click **New Runtime Environment**.
3. Select **Google Cloud Platform**.
4. Click **Next**.
5. Select the Google account to use.

- Enter the following properties:

Property	Description
Project	A project defines how Informatica Intelligent Cloud Services interacts with Google services and what resources it uses. Select your Google Cloud project from the drop-down list. <b>Note:</b> If you don't have a project, exit the installation wizard and create your project on Google Cloud. You can't create a project from within Informatica Intelligent Cloud Services.
Secure Agent Name	Enter a name for your Secure Agent. The name needs to conform to the following rules: <ul style="list-style-type: none"> <li>- The name can be up to 43 characters long, with a combination of letters, numbers, and hyphens.</li> <li>- The first character must be a lowercase letter.</li> <li>- The last character can't be a hyphen.</li> <li>- All letters must be lowercase.</li> </ul> By default, the runtime environment uses the same name as the agent.
Region	Select the region to deploy the Secure Agent. Choose a region that's appropriate for your organization and your customers.
Machine Type	Select the machine type for your virtual machine. If you're not familiar with Google machine types, start with a size with at least 4 cores and 16 GB of memory.
Virtual Network	Specify whether to use an existing virtual network based on your Google subscription or create a new virtual network. A virtual network uses hardware and software to emulate a physical network.
Virtual Network Name	Select an existing virtual network or enter the name for a new virtual network.
Subnet	Select the subnet to use or enter a name for a new subnet.
Subnet Address	Select the subnet address that includes all the resources or enter a new subnet address. Subnet addressing allows a system made up of multiple networks to share the same Internet address.

- Select the **I acknowledge this action will incur costs in Google Cloud Platform** check box to acknowledge that costs will be incurred on your Google account.
- Click **Create**.  
Informatica Intelligent Cloud Services creates your runtime environment and displays it on the **Runtime Environments** page.

## Troubleshooting connection issues on Google Cloud

The firewall in Google Cloud can block access to your VM. If this occurs, add a firewall rule to allow RDP and SSH access to your VM instances.

When Google Cloud blocks access, the runtime environment fails to start with the following error:

```
Connection Failed. We are unable to connect to the VM on port 22.
```

- In the Google Cloud console, go to the **Firewall Rules** page.
- Click **Create firewall rule**.

3. Create a firewall rule with the following settings:

Setting	Value
Name	Enter a name for the firewall rule. For example: allow-ingress-from-iap (<name>)
Direction of traffic	Ingress
Action on match	allow
Target	All instances in the network
Source filter	IP ranges
Source IP ranges	35.235.240.0/20
Protocols and ports	Select <b>TCP</b> and enter 22, 3389 to allow both RDP and SSH.

4. Click **Create**.

## Use Azure

The Data Integration installer can configure a runtime environment on Microsoft Azure. Note that running data integration tasks on Azure incurs costs based on the workload and the VM size.

**Note:** You need a Microsoft Azure subscription with permissions that allow you to deploy resources. If admin consent is enabled at your organization, reach out to the Azure administrator for app consent approvals. For more information about admin consent requests, see the [Microsoft documentation](#).

1. On the **Home** page, click **Add a runtime environment**.
2. On the **Runtime Environments** page, click **New Runtime Environment**.
3. Select **Microsoft Azure**.
4. Click **Next**.
5. Select the Microsoft account to use.

6. Enter the following properties:

Property	Description
Subscription	<p>Select your Microsoft Azure subscription. The subscription must include permissions to deploy the following resources:</p> <ul style="list-style-type: none"> <li>- Network security group</li> <li>- Virtual network (including subnet)</li> <li>- Network interface</li> <li>- Public IP address</li> <li>- OS disk</li> <li>- Virtual machine</li> </ul> <p>Be sure to grant permission to the Hyperscaler Azure Integration App when prompted.</p> <p><b>Note:</b> If you do not have an Azure subscription, exit the installer and sign up for one with Microsoft. You cannot sign up from within Informatica Intelligent Cloud Services.</p>
Resource Group	<p>A resource group is a container that holds related resources for your runtime environment. Informatica Intelligent Cloud Services uses one resource group for each Secure Agent to simplify management of the VM resources for that agent.</p> <p>You typically create new resource groups, but you can use any existing group that is empty.</p> <p><b>Tip:</b> Use the same or similar name as the Secure Agent to more easily identify which resource group belongs with each agent.</p>
Resource Group Name	<p>Name of the resource group. Enter the name of a new group or select an existing group. Ensure that any existing resource group is empty, otherwise this message appears: <i>"API Input validation failed."</i></p>
Location	<p>Select the region to deploy the Secure Agent. Choose the Azure region that's appropriate for your organization and your customers. Not every resource is available in every region.</p>
VM Name	<p>Enter a name for the virtual machine (VM) that will be created.</p>
VM User Name	<p>Enter your name as the virtual machine user.</p>
VM Password	<p>Enter a password to access the virtual machine.</p>
Secure Agent Name	<p>Enter a name for your Secure Agent. By default, the runtime environment has the same name as the agent.</p> <p><b>Tip:</b> Use the same or similar name as the resource group, to more easily identify which resource group belongs with each agent.</p>
VM Size	<p>Select a size for your virtual machine. If you are unfamiliar with Azure image sizing, start with a size with at least 4 cores and 16 GB of memory.</p> <p>Note that your Azure hourly charges are affected by the VM size.</p>
Virtual Network	<p>Select an existing virtual network based on your Microsoft Azure subscription and location or create a new virtual network.</p>
Virtual Network Name	<p>Select an existing virtual network or enter the name for a new virtual network. When you select an existing virtual network, this associates the newly created VM with the existing VNet.</p>
Virtual Network Address	<p>Select an existing virtual network address or enter a new address.</p>

Property	Description
Subnet Name	Select the subnet to use or enter a name for a new subnet. The subnet holds all the Azure resources that are deployed to the virtual network.
Subnet Address	Select the subnet address that includes all the resources or enter a new subnet address. Subnet addressing allows a system made up of multiple networks to share the same Internet address.
CIDR IP Address Range	Enter the CIDR IP address range. CIDR (Classless Inter-Domain Routing) is a method for allocating IP addresses. It configures a network rule to allow remote access to the Secure Agent. The "/x" portion of the address determines how many IP addresses are available in the subnet, for example: 108.124.81.10/32

**Tip:** For more information, refer to "[Explore Azure Virtual Networks](#)" in the Microsoft documentation.

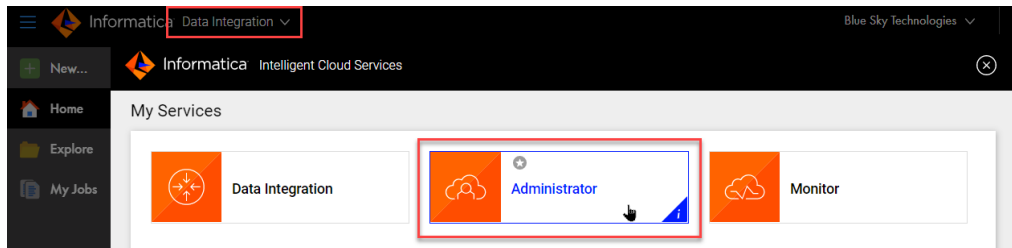
7. Click **Create**. Data Integration creates your runtime environment and displays it on the **Runtime Environments** page.

## Install an agent manually

You can download and install a runtime environment manually if you can't use the Hosted Agent or the installation wizard. For example, you're running the agent on Windows, you need to install the agent on a local machine, or you need to access data sources behind a firewall.

When you install an agent manually, you can access data stored on-premises or on a cloud platform other than AWS, Google Cloud, or Microsoft Azure.

1. Switch to the **Administrator** service.



2. In Administrator, click **Runtime Environments**.
3. Download and install a Secure Agent.

For more information, see "Secure Agent installation" in the *Administrator* help.

## CHAPTER 4

# Connection configuration

When you create a connection, it's available to your Data Integration organization.

For most connection types, when you configure a connection, you specify the runtime environment for the connection. The runtime environment must contain an agent that is running when you configure the connection. For other connection types, you specify the runtime environment when you configure the task.

This section includes general information about setting up a connection. For more information about connections and for specific information connection properties, see the **Connections and Connectors** section of the help.

## Configuring a connection

You can configure a connection on the **Connections** page, in a wizard as you configure a task or taskflow, or in the Mapping Designer as you configure a mapping.

To access the **Connections** page, in Administrator, select **Connections**.

1. Configure the following connection details:

Connection detail	Description
Connection Name	Name of the connection. Each connection name must be unique within the organization. Connection names can contain alphanumeric characters, spaces, and the following special characters: _ . + - Maximum length is 100 characters. Connection names are not case sensitive.
Description	Description of the connection. Maximum length is 255 characters.
Type	Type of connection, such as Salesforce or Oracle.

2. Configure the connection-specific properties. For example, if this is a Flat File connection type, enter the runtime environment to be used with the connection, the directory where the flat file is stored, the date

format for date fields in the flat file, and the code page of the system that hosts the flat file. The following image shows the property fields for a flat file connection:

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

- Connection Name:** SalesAccounts-FlatFile
- Description:** (empty)
- Type:** Flat File
- Flat File Connection Properties:**
  - Runtime Environment:** CAB123456
  - Directory:** C:\OurCompany\Sales (with a 'Browse...' button)
  - Date Format:** MM/dd/yyyy HH:mm:ss
  - Code Page:** UTF-8

3. To test the connection, click **Test**. The results of the test display on the page, as shown in the following image:

The screenshot shows the 'SalesAccounts-FlatFile' dialog box with a green checkmark and the message: "The test for this connection was successful." The fields are the same as in the previous screenshot.

If a database connection fails, contact the database administrator.

4. Click **Save** to save the connection.

## Object search and selection

When you select a connection in a Data Integration mapping or task, you can search for the object or objects that you want to use.

When you search for an object, the **Select Object** dialog box displays the objects available for the connection. You can select one of the objects or you can enter a search string. To begin a search, click **Search** or press **Enter**.

**Note:** For some connection types, you must select the schema associated with the object in the **Packages** pane before you can view and select objects. You can search for the schema to use.

For mapping tasks, use object search when the connection responds slowly.

Use the following guidelines when you enter a search string:

- Use an asterisk (\*) as a wildcard character.
- Use quotation marks (") to perform an exact search. An exact search is case-sensitive.



# CHAPTER 5

## Project setup

Create projects and project folders on the **Explore** page to organize your assets. After you have set up the runtime environment and connections that are required for a project, you can create the assets for the project.

You can't use the following characters:

# ? ' | { } " ^ & [ ] / \

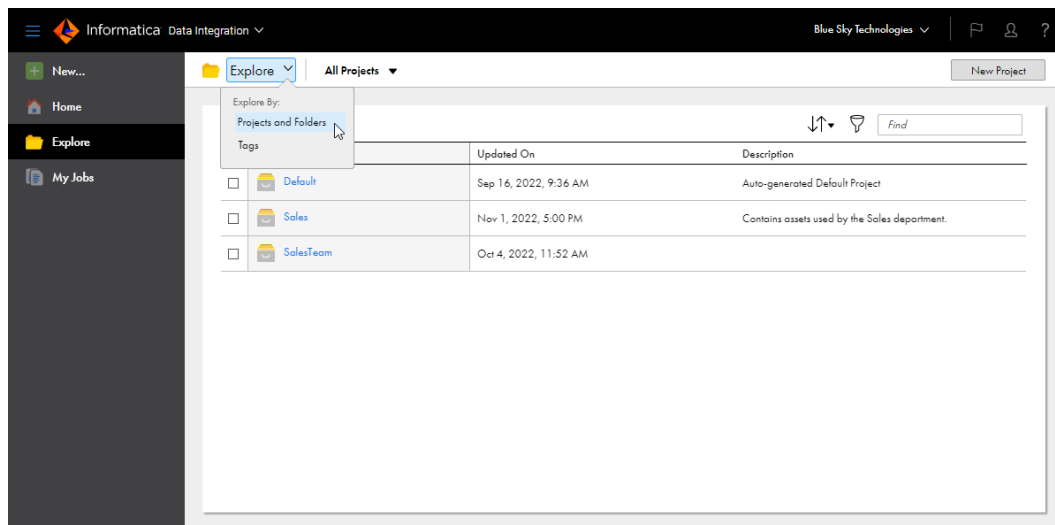
Do not use these characters in project, folder, asset, or tag names.

## Creating projects and folders

Projects can contain multiple folders that you can use to organize the assets used in the project. Create projects and folders on the **Explore** page.

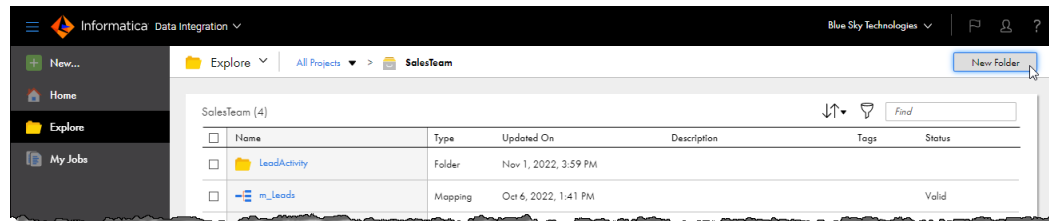
To create a project, open the **Explore** page, explore by projects and folders, and then click **New Project**.

The following image shows how to explore by projects and folders:



To create a folder, go to the **Explore** page, open the project, and then click **New Folder**.

The following image shows the New Folder button in an open project:



You can create one level of folders in a project. You cannot create folders within folders.

For more information about working with projects, see *Asset Management*.

## Creating assets

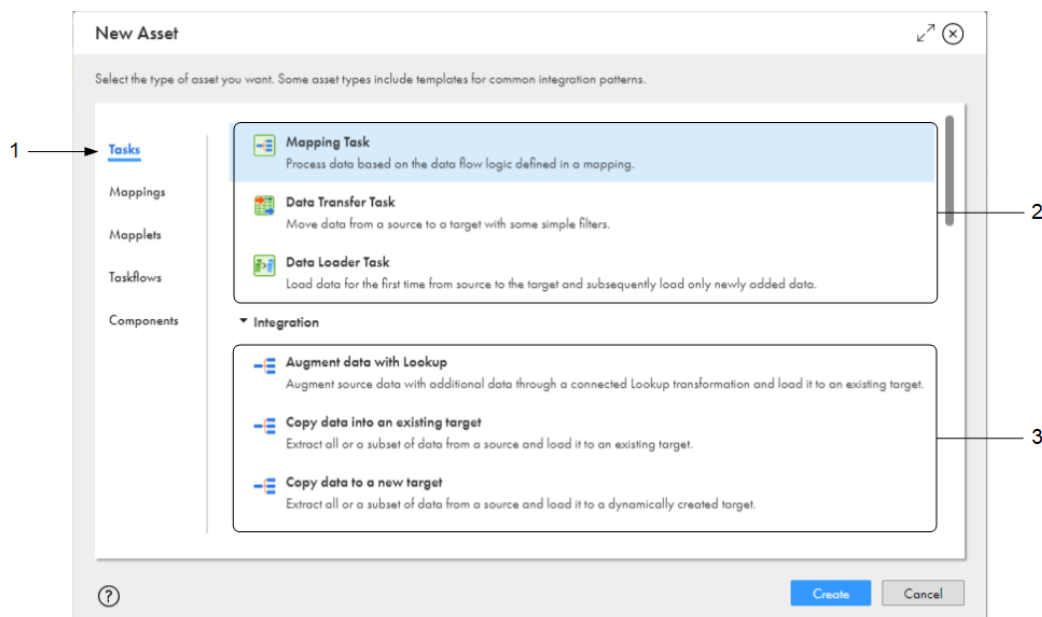
Create integration assets and assign them to projects.

You can create custom assets or create assets from a template.

To create a custom asset, click **New** and then select the asset type. For specific information on creating a particular type of asset, see the appropriate asset type in *Mappings* or *Tasks*.

To create an asset from a template, click **New**, select the asset type, and then select the appropriate template. Mapping task templates and mapping templates are listed below the heading that corresponds to the mapping type.

The following image shows the dialog box that appears when you create an asset:



1. Select the type of asset that you want to create. In this image, Tasks is selected.
2. Select one of these options to create a custom asset. Since Tasks is selected on the left, this area lists the tasks that you can create.
3. Select one of the options below a heading to create a task from a template. In this image, the Integration heading is expanded, so the templates listed are based on data integration mappings.

**Tip:** Informatica recommends that you use a standard naming convention that makes sense for your organization. Here are a few examples:

- You can begin all asset names with an abbreviation of the asset type. For example, mapping names begin with m\_ and mapping tasks begin with mt\_.
- Within mappings, you can begin all Source transformation names with src\_, all parameter names with p\_, and so on.
- You can use names that explain the purpose of the object, For example, filter names begin with flt\_.

A standard naming convention is particularly helpful when you are working with large, complex mappings so that you can easily identify the type and purpose of each object.

For more information on working with assets, see *Asset Management*.

## CHAPTER 6

# Editing your user profile

You can update the information in your user profile. Your user profile includes your name, user name, job title, email address, phone number, time zone, password, and security question and answer. You can update any of the information except for your user name.

To update the information, click the **User Settings** icon in the top right corner, and select **Profile**.

When you update your email address, Data Integration sends a verification email to the new address. Your email address is updated after you click the link in the verification email.

## CHAPTER 7

# Inviting users to join your organization

If you have the Admin role, you can invite users to join your organization. Invite users so that they can create mappings and tasks or to help you configure a primary cloud data warehouse or runtime environment.

1. Perform either of the following steps:
  - On the **Home** page, click **Invite a friend or colleague**, and then click **Invite New User**.
  - If you're configuring a primary cloud data warehouse or setting up a runtime environment, click **Invite a friend or colleague to help you**.
2. Enter the first name, last name, email address, user name, and role for the person you want to invite.  
The user name must be unique within the organization. You cannot change the user name after you invite the user.  
You must assign the user you invite the Admin or Designer role.
3. Click **OK**.  
The user you invite receives an email with a link to join your organization.

## CHAPTER 8

# Primary cloud data warehouse setup

You can configure a primary cloud data warehouse where you normally load data. When you do this, the data loader tasks that you create are automatically configured to load data to this target. You can still change the target if you wish.

The setup steps vary based on whether you've already configured a primary cloud data warehouse. If you've already configured one, you can change or unselect it.

## Configuring a primary cloud data warehouse

Configure a primary cloud data warehouse from the **Home** page.

1. On the **Home** page, click **Yes, let's go** in the **Do you use a cloud data warehouse as your primary destination?** panel.
2. On the **Destination** page, select your cloud data warehouse type, for example, Snowflake Data Cloud or Databricks Delta, and click **Next**.
3. On the **Connect** page, select a connection, or click **New** and enter the connection properties.
4. Click **Connect**.

## Changing or unselecting a primary cloud data warehouse

If you've already configured a primary cloud data warehouse, you can change or unselect it. Change or unselect a primary cloud data warehouse from the **Home** page.

1. On the **Home** page, click the cloud data warehouse type in the upper right corner and select **Change primary cloud data warehouse**.
2. If you want to change your primary cloud data warehouse, select **I have a primary cloud data warehouse**.

3. To change the cloud data warehouse type, complete the following steps:
  - a. Click **Change** next to **Type**.
  - b. On the **Destination** page, select the data warehouse type, and then click **Next**.
  - c. On the **Connect** page, select a connection, or click **New** and enter the connection properties.
  - d. Click **Connect**.
4. To change the connection, complete the following steps:
  - a. Click **Change** next to **Connection**.
  - b. On the **Connect** page, select a connection, or click **New** and enter the connection properties.
  - c. Click **Connect**.
5. If you no longer wish to use a primary cloud data warehouse, select **I don't have a primary cloud data warehouse**, and click **Save**.

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