

Xactly

User Guide

Abstract

Xactly user guide provides a brief introduction on cloud connectors and its features.

The guide provides detailed information on setting up the connector and running data synchronization tasks (DSS). A brief overview of supported features and task operations that can be performed using Xactly connector is mentioned.

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Overview

Informatica cloud connector developed using SDK framework are off-cycle, off release “add-ins” that facilitate data integration to SaaS and on-premise applications, which are not supported natively by Informatica cloud. The cloud connectors are specifically designed to address most common use cases such as moving data into cloud and retrieving data from cloud for individual application.

Informatica Cloud Architecture

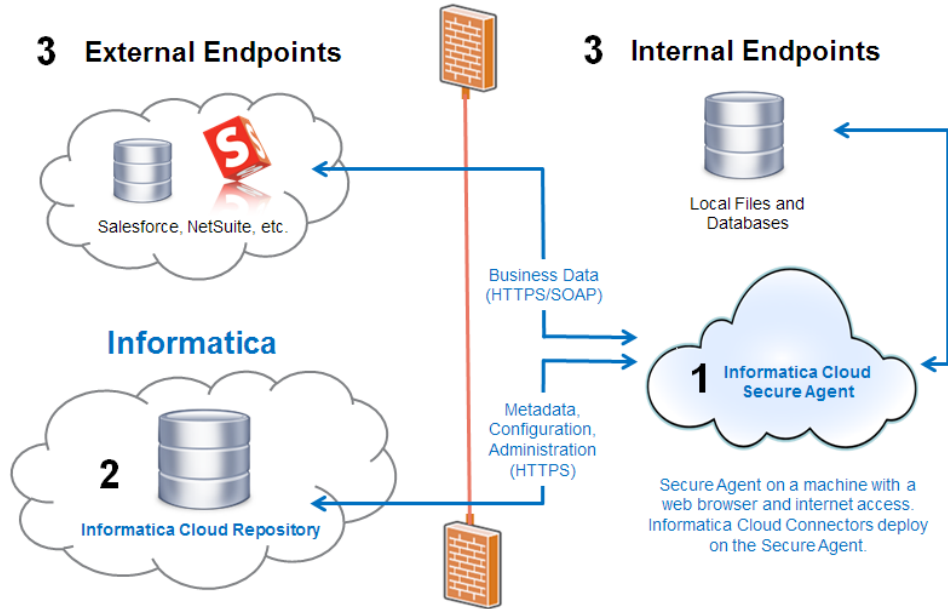


Figure 1: Informatica Cloud Architecture

Once the Xactly cloud connector is enabled for your ICS ORG Id, you need to create a connection in Informatica cloud to use the connector.

Xactly Connector

The Xactly connector helps you to integrate commission related data from Xactly with on-premise or cloud Applications.

Information from Xactly such as commissions, bonus, orders, users, and roles can be integrated with other on-premise or cloud applications such as Salesforce, Workday, SAP and so on.

Pre-requisites for Installing the Xactly Connector Plug-in

You need Xactly Application or Portal Access that is User credentials, for creating Xactly Connection in the Informatica Cloud.

For the connection you need to provide the endpoint url, WSDL File Path and authentication parameters.

Assumptions and Considerations

Xactly Connector is developed and tested with following assumptions:

- Axis 1.4 is used to create client stubs from xactly wsdl. Refer [Generating Client-Stub for Xactly WSDL using Axis 1.4](#).
- Lookup is supported by xactly connector for all the readable objects.
- The supported operation was created after referring to the xactly developers guide. Any deviation in the way the operation is supported or unsupported at runtime of the connector, depends on the xactly endpoint implementation.
- The xactly server has shown some deviation from the documented process. You should contact xactly support for any clarification regarding the same.

Supported Features, Objects and Task Operations

The following table provides the list of features and objects supported by Xactly connector.

Features are different entities of Xactly connector. Each feature will contain set of objects under them.

| Features | Task Operations | | | | | |
|-----------------------|-----------------|--------|--------|--------|--------|---------|
| | Read | Insert | Update | Upsert | Delete | Look UP |
| User | ✓ | NA | NA | ✓ | ✓ | ✓ |
| Role | ✓ | NA | NA | ✓ | ✓ | ✓ |
| Person | ✓ | NA | NA | ✓ | ✓ | ✓ |
| Position | ✓ | NA | NA | ✓ | ✓ | ✓ |
| PositionRelations | ✓ | NA | NA | ✓ | ✓ | ✓ |
| PositionRelationType | ✓ | NA | NA | ✓ | ✓ | ✓ |
| PositionHierarchy | ✓ | NA | NA | ✓ | ✓ | ✓ |
| PositionHierarchyType | ✓ | NA | NA | ✓ | ✓ | ✓ |
| Title | ✓ | NA | NA | ✓ | ✓ | ✓ |

✓: Supported

NA: Not Applicable

Enabling Xactly Connector

To enable Xactly connector, contact Informatica support or Informatica representative. It usually takes 15 minutes for the connector to download to secure agent, after it is enabled.

Note: To install secure agent, see [Installing Informatica Secure Agent](#).

Creating a Xactly Connection

To use Xactly connector in data synchronization task, you must create a connection in Informatica Cloud.

The following steps help you to create Xactly connection in Informatica Cloud.

1. In Informatica Cloud home page, click **Configure**.
2. The drop-down menu appears, select **Connections**.
3. The Connections page appears.
4. Click **New** to create a connection.
5. The New Connection page appears.

The screenshot shows a web form for creating a new Xactly connection. It is titled 'Connection Details' and 'Xactly Connection Properties'. The 'Connection Name' field contains 'Xactly'. The 'Description' field is empty. The 'Type' dropdown menu is set to 'Xactly (ICL)'. Under 'Xactly Connection Properties', the 'Secure Agent' dropdown is set to 'INV28IS05'. The 'UserID' field contains 'informatica@demobiz.com'. The 'PassKey' field is masked with dots. The 'Xactly App Name' field contains 'Incent'. The 'WSDL URL' and 'Endpoint URL' fields both contain 'https://www.xactlycorp.com/icm/services/Discovery...'. The 'Enable Logging' checkbox is checked.

Figure 2: Creating a new connection

6. Specify the following details.

| Connection Property | Description |
|---------------------|--|
| Connection Name | Enter a unique name for the connection. |
| Description | Provide a relevant description for the connection. |
| Type | Select Xactly from the list. |
| Secure Agent | Select the appropriate secure agent from the list. |
| UserID | Enter the Userid for Xactly Portal access. |

| Connection Property | Description |
|---------------------|--|
| PassKey | Enter the Password for Xactly Portal access. |
| Xactly App Name | Mention the application name to use to sign in to Xactly. |
| WSDL URL | Provide the WSDL Url. |
| Endpoint URL | Provide the endpoint url where request is intended to send. |
| Enable Logging | check this box to log SOAP request and response in the session log file. |

7. Click **Ok** to save the connection.

Note: It is recommended to test the connection before saving it. Click **Test** to evaluate the connection.

Creating a Xactly Data Synchronization Task (DSS)

Note: You need to create a connection before getting started with data synchronization task.

The following steps help you to setup a data synchronization task in Informatica Cloud.

Let us consider the task operation **Insert** to perform the Data synchronization task.

1. In Informatica Cloud home page, click **Apps**.
2. The drop-down menu appears, select **Data Synchronization**.
3. The **Data Synchronization** page appears.
4. Click **New** to create a data synchronization task.
5. The **Definition** tab appears.

Figure 3: Definition Tab

6. Specify the **Task Name**, provide a **Description** and select the Task Operation **Insert**.
7. Click **Next**.
8. The **Source** tab appears.

1 Definition 2 Source 3 Target 4 Data Filters 5 Field Mapping 6 Schedule

< Previous Next > Save Cancel

Source Details

Connection:* Xactly View... New... ?

Source Type:* Single Multiple Saved Query

Source Object:* Position Select... ?

Display technical names instead of labels
 Display source fields in alphabetical order

Data Preview

Position Preview All Columns (Total Columns: 13)

| name | description | incentiveStartDate | incentiveEndDate | title | ... |
|----------|-------------|--------------------|------------------|----------|-----|
| SVP1 | | | | 59726198 | ... |
| VP-NA | | | | 59726198 | ... |
| VP-EU | | | | 59726198 | ... |
| RM-EAST | | | | 59726201 | ... |
| RM-WEST | | | | 59726201 | ... |
| RM-SOUTH | | | | 59726201 | ... |
| SR1 | | | | 59726206 | ... |
| SR2 | | | | 59726206 | ... |
| SR3 | | | | 59726206 | ... |
| SR4 | | | | 59726206 | ... |

Figure 4: Source Tab

9. Select the source **Connection**, **Source Type** and **Source Object** to be used for the task.
10. Click **Next**.
11. The **Target** tab appears. Select the target **Connection** and **Target Object** required for the task. See Also: [When using Xactly as a Target Connection](#).

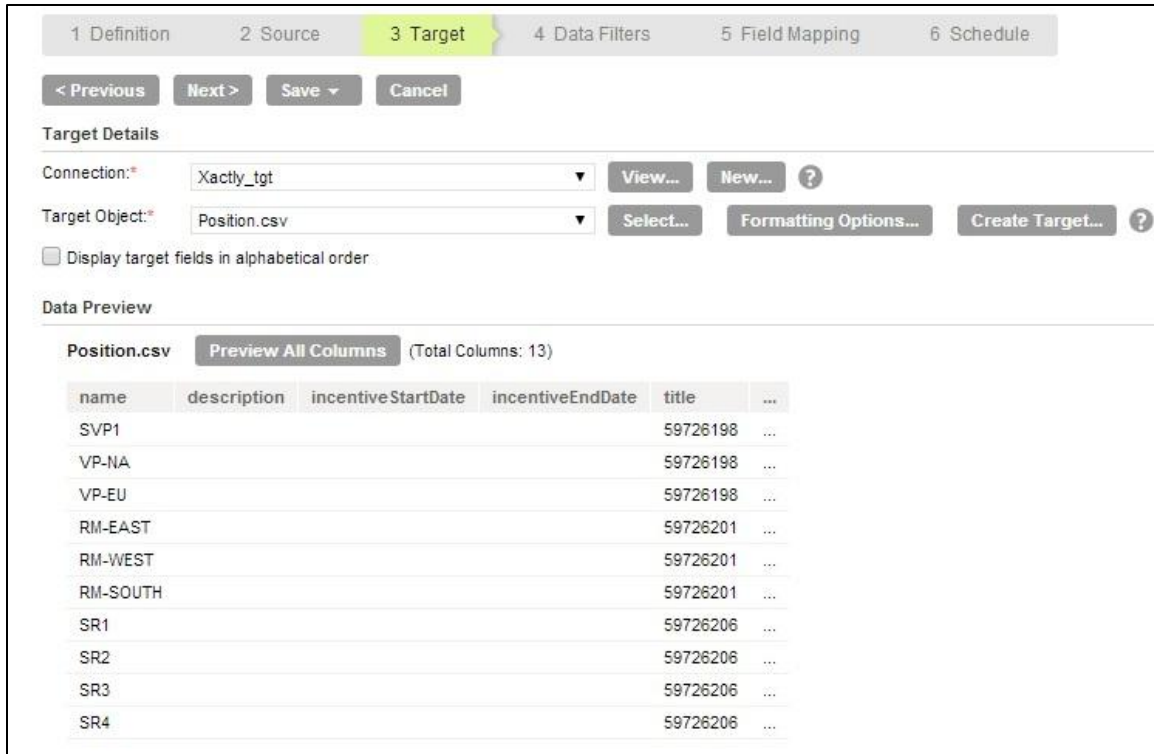


Figure 5: Target Tab

12. Click **Next**.
13. In **Data Filters** tab by default, Process all rows is chosen. To assign filters to DSS task, see [Data Filters](#).
14. Click **Next**.
15. In **Field Mapping** tab, map source fields to target fields accordingly.

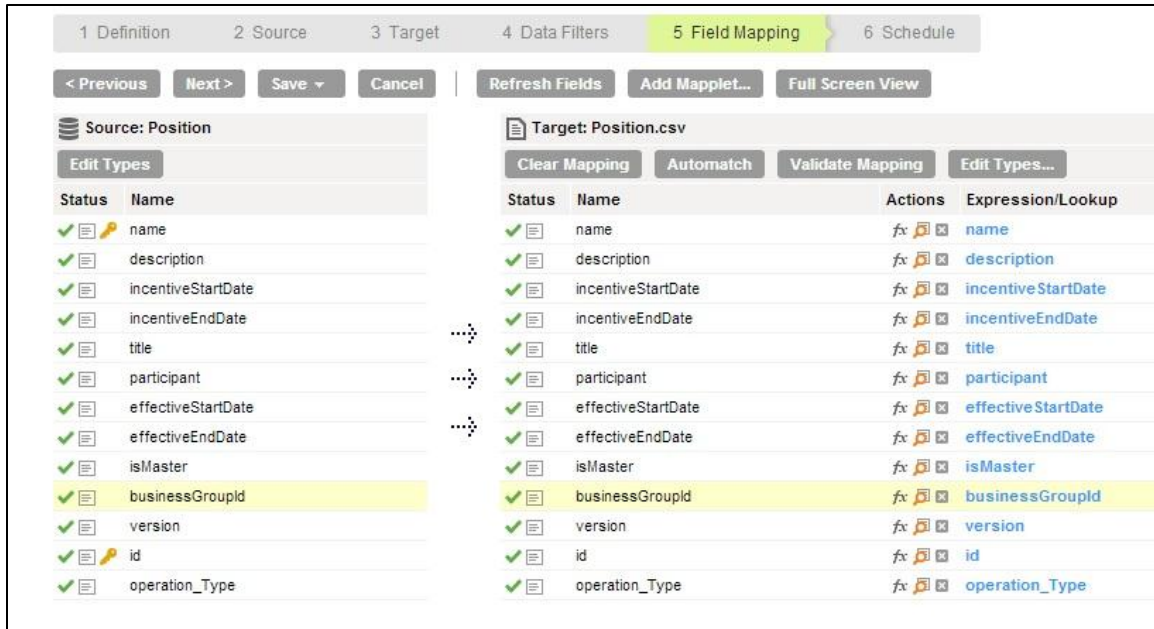


Figure 6: Field Mapping Tab

16. Click **Next**.
17. The **Schedule** tab appears.
18. In Schedule tab, you can schedule the task as per the requirement and save.
19. If you do not want schedule the task, click **Save and Run** the task.

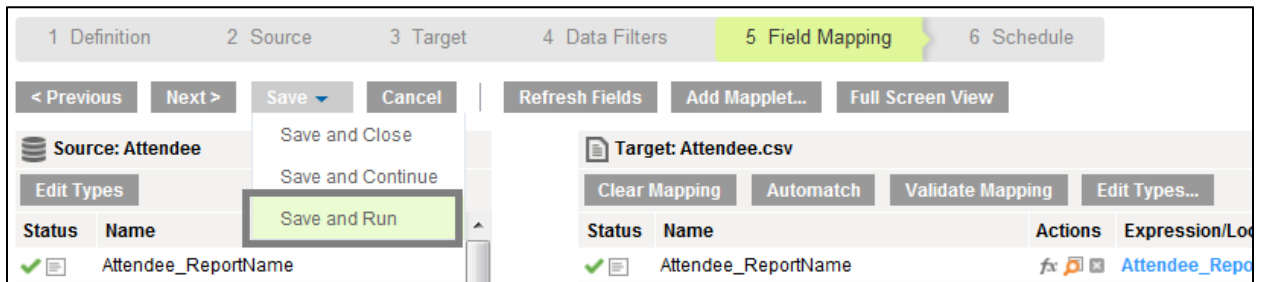


Figure 7: Save and Run the Task

After you **Save and Run** the task, you will be redirected to monitor log page. In monitor log page, you can monitor the status of data synchronization tasks.

Defining Xactly Write Operations

The default writing data into xactly objects is carried out in the given below ways:

- Select **upsert** operation in Definitions tab of DSS to perform xactly **save** operation
- Select **delete** operation in Definitions tab of DSS to perform Xactly **delete** operation.

Given below are other operations performed using Xactly Connector:

- saveversion - The saveVersion operation enables you to save a version of an effective dated object
- addversion – The addVersion operation enables you to add a new version of an effective dated object.
- deleteversion - The deleteVersion operation enables you to delete a version of an effective dated object.

Note: You must define the appropriate operations in the **operation type** field in the field mapping tab.

Following figure displays an example to define saveversion operation :

The screenshot shows the 'Field Mapping' tab in the Xactly Connector interface. It displays a mapping between a source table 'Position' and a target table 'Position.csv'. The source table has columns: name, description, incentiveStartDate, incentiveEndDate, title, participant, effectiveStartDate, effectiveEndDate, isMaster, businessGroupId, version, id, and operation_Type. The target table has columns: name, description, incentiveStartDate, incentiveEndDate, title, participant, effectiveStartDate, effectiveEndDate, isMaster, businessGroupId, version, id, and operation_Type. The 'businessGroupId' field in both tables is highlighted in yellow. The 'operation_Type' field in the target table is set to 'saveVersion'. The interface includes navigation buttons like '< Previous', 'Next >', 'Save', 'Cancel', 'Refresh Fields', 'Add Mapplet...', and 'Full Screen View'.

Data Filters

Data filters help you to fetch specific data of a particular object. The DSS task will process the data based on the filter field assigned to the object.

The following steps help you to use data filters.

1. In Data synchronization task, select **Data Filters** tab.
2. The Data Filters tab appears.
3. Click **New** as shown in the figure below.



Figure 8: Data Filters

4. The Data Filter dialog box appears.

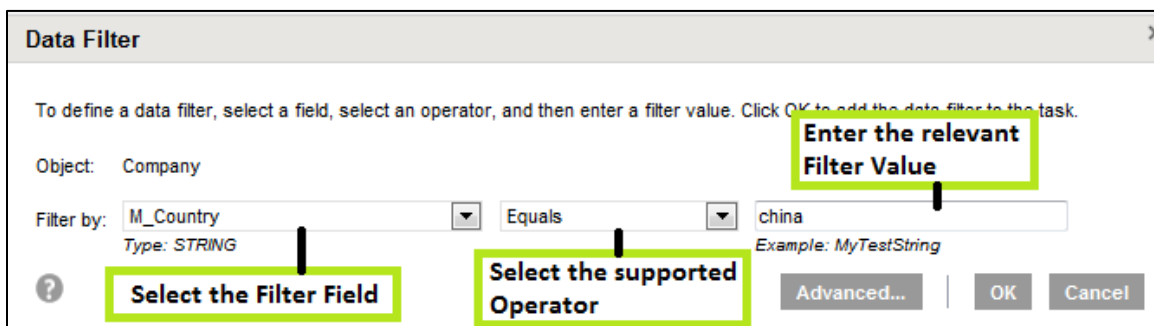


Figure 9: Data Filters-2

5. Specify the following details.

| Field Type | Description |
|--------------|---|
| Object | Select Object for which you want to assign filter fields. |
| Filter By | Select the Filter Field. |
| Operator | Select the corresponding operator. |
| Filter Value | Enter the Filter value. |

6. Click **Ok**.

Troubleshooting configuration issues

1. Check the **Enable Logging** check box to study the SOAP request and response. The SOAP request and response will be logged in the session of the task.
2. In xactly, the **equals** operator behaves as **Contains** operator as well. This is mainly due to the endpoint is defined. You can contact xactly support for further clarification.
3. Though as per xactly metadata id is a mandatory field but is not a **Business key field**.
4. For operations such as saveversion,deleteversion and delete,It is mandatory to mention the ID. If you don not mention an ID in the csv file, it throws **The object passed to the API operation is invalid** error on execution.
5. Operations such as **delete** and **deleteVersions** are said to be supported for all objects, but it may vary if xactly endpoint behavior does not synch with its developer guide document.
6. Though xactly endpoint returns success status for delete operation for some objects, it does not the data behind the scene. You can consult the xactly support for this behavior.
7. Contact Informatica Cloud customer support If you get **Out of Memory** exception.

Note: Use the xactly **Enable logging** feature of the connector to collect the SOAP request before contacting the xactly support.

The log and exception messages thrown during the configuration is captured in the log files. The log files are saved in specific location.

For example, C:\Program Files\Informatica Cloud Secure Agent\main\tomcat\log\<connectorname><date & time stamp>.

The log file name is the connector name appended with time stamp.

Troubleshooting Data Synchronization Task (DSS)

While creating DSS task, the “NULL” error message will appear when a connector with invalid configuration selected. The null error message files are saved in specific location.

For example, C:\Program Files\Informatica Cloud Secure Agent\main\tomcat\log\<connectorname><date & time stamp>.

The log and exception details of a failed DSS task will be captured under the “Session Log”. You require special permission privileges to run the application in debug mode.

Increasing Secure Agent Memory

To overcome memory issues faced by secure agent follow the steps given below.

1. In Informatica Cloud home page, click **Configuration**.
2. Select **Secure Agents**.
3. The secure agent page appears.
4. From the list of available secure agents, select the secure agent for which you want to increase memory.
5. Click **pencil** icon corresponding to the secure agent. The pencil icon is to edit the secure agent.
6. The Edit Agent page appears.
7. In **System Configuration** section, select the Type as “DTM”.
8. Edit **JVMOption1** as “-Xmx512m” as shown in the figure below.

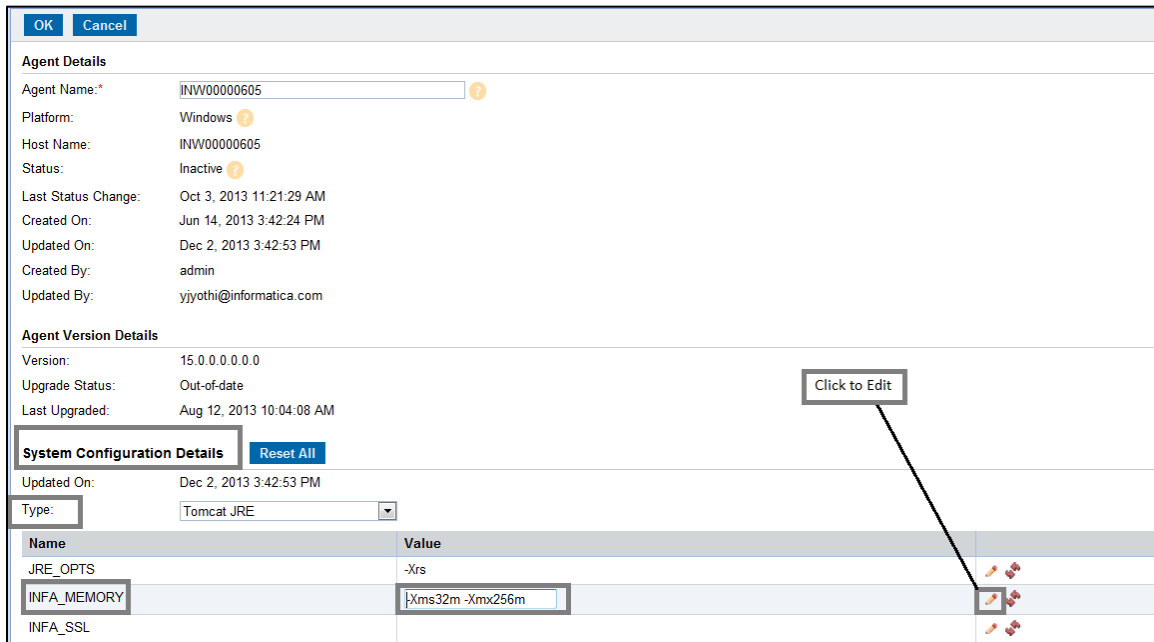
The screenshot shows the 'Edit Agent' page for a secure agent named 'INW00000605'. The 'System Configuration Details' section is expanded, showing a table of configuration parameters. The 'JVMOption1' parameter is highlighted with a box, and its value is '-Xmx512m'. A callout box labeled 'Click to Edit' points to the pencil icon in the right column of the table.

| Name | Value | |
|--------------------------|---------------|--|
| OptimizeODBCWrite | No | |
| __PMOV_FFWD_ESCAPE_QUOTE | Yes | |
| RecordSessStatInRepo | No | |
| JVMOption2 | | |
| JVMOption1 | -Xmx512m | |
| RepositoryName | XMLRepository | |

Figure 10. Increasing Secure Agent Memory-1

9. Again in **System Configuration** section, select the **Type** as “TomCatJRE”.

11. Edit **INFA_memory** as “**-Xms256m -Xmx512m**” as shown in the figure below.



The screenshot shows the configuration interface for a Secure Agent. It is divided into several sections: Agent Details, Agent Version Details, and System Configuration Details. The System Configuration Details section includes a table of configuration parameters. The INFA_MEMORY parameter is highlighted, and its value is shown as -Xms32m -Xmx256m. A callout box labeled 'Click to Edit' points to the edit icon for this parameter.

| Name | Value |
|-------------|------------------|
| JRE_OPTS | -Xrs |
| INFA_MEMORY | -Xms32m -Xmx256m |
| INFA_SSL | |

Figure 11. Increasing Secure Agent Memory-2

12. Restart the secure agent.

The secure agent memory has been increased successfully.

Generating Client-Stub for Xactly WSDL using Axis 1.4

The following are the steps that needs to be followed to create a Stub (i.e. xactly-client.jar) for the xactly WSDL

1. Before we start with Stub creation we need to have the Environment set-up
2. Please download jdk 1.6.0_31 from the link <http://www.oracle.com/technetwork/java/javasebusiness/downloads/java-archive-downloads-javase6-419409.html#jdk-6u31-oth-JPR>

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| Product / File Description | File Size | Download |
|--------------------------------|-----------------|----------------------------------|
| Linux x86 (32-bit) | 77.07 MB | jdk-6u31-linux-i586-rpm.bin |
| Linux x86 (32-bit) | 81.34 MB | jdk-6u31-linux-i586.bin |
| Linux Intel Itanium (64-bit) | 60.27 MB | jdk-6u31-linux-ia64-rpm.bin |
| Linux Intel Itanium (64-bit) | 67.92 MB | jdk-6u31-linux-ia64.bin |
| Linux x64 (64-bit) | 77.32 MB | jdk-6u31-linux-x64-rpm.bin |
| Linux x64 (64-bit) | 81.62 MB | jdk-6u31-linux-x64.bin |
| Solaris x86 (32-bit) | 81.23 MB | jdk-6u31-solaris-i586.sh |
| Solaris x86 (32-bit) | 137.35 MB | jdk-6u31-solaris-i586.tar.Z |
| Solaris SPARC (32-bit) | 86.2 MB | jdk-6u31-solaris-sparc.sh |
| Solaris SPARC (32-bit) | 141.89 MB | jdk-6u31-solaris-sparc.tar.Z |
| Solaris SPARC (64-bit) | 12.24 MB | jdk-6u31-solaris-sparcv9.sh |
| Solaris SPARC (64-bit) | 15.59 MB | jdk-6u31-solaris-sparcv9.tar.Z |
| Solaris x64 (64-bit) | 8.5 MB | jdk-6u31-solaris-x64.sh |
| Solaris x64 (64-bit) | 12.25 MB | jdk-6u31-solaris-x64.tar.Z |
| Windows x86 (32-bit) | 78.98 MB | jdk-6u31-windows-i586.exe |
| Windows Intel Itanium (64-bit) | 63.34 MB | jdk-6u31-windows-ia64.exe |
| Windows x64 (64-bit) | 69.55 MB | jdk-6u31-windows-x64.exe |

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- Download the Axis 1.4 from http://www.apache.org/dyn/closer.cgi/ws/axis/1_4 and unzip the file in some folder say c:\temp\ (let's call this path as **AXIS_LIB**) URL.
- Download the xactly wsdl to a temporary path.
- Given below are the commands for creating the xactly stub. The user can either run the command one by one in the command prompt or copy paste the entire commands to a win batch file and run it as a batch file.

```

set AXIS_PATH=C:\temp\axis-1_4
set AXIS_LIB=%AXIS_PATH%\lib\axis-ant.jar;%AXIS_PATH%\lib\axis.jar;%AXIS_PATH%\lib\commons-discovery-0.2.jar;%AXIS_PATH%\lib\commons-logging-1.0.4.jar;%AXIS_PATH%\lib\jaxrpc.jar;%AXIS_PATH%\lib\log4j-1.2.8.jar;%AXIS_PATH%\lib\saa.jar;%AXIS_PATH%\lib\wsdl4j-1.5.1.jar
set classpath=%JAVA_HOME%;%AXIS_LIB%

set PATH=%JAVA_HOME%;%PATH%

mkdir c:\temp\Xactly

```

```
java org.apache.axis.wsdl.WSDL2Java -v -a -o C:\temp\Xactly
C:\temp\DiscoveryService.wsdl

mkdir classes

javac -cp .;"%classpath%" Xactly/com/xactly/icm/xtoolkit/wso/*.java
Xactly/Xactly/*.java -d classes

jar -cvf C:\temp\Xactly\Xactly_client.jar -C C:\temp\classes com
```

6. Stop the Informatica Cloud Secure Agent.
7. Copy the xactly-client jar to the following paths:
c:\Progra~1\Informatica Cloud Secure Agent\main\bin\rdtm\javalib\<plugin-id number>
c:\Progra~1\Informatica Cloud Secure Agent\main\tomcat\plugins\<plugin-id number>
Note: Do not take the backup of the existing metadata jar in the same path or in the secure agent installation path.
8. Start the Informatica Cloud Secure Agent.

Known Future Enhancements and Current Issues

The current release supports read and write operation for 9 xactly objects. Other objects will be added in the upcoming releases.