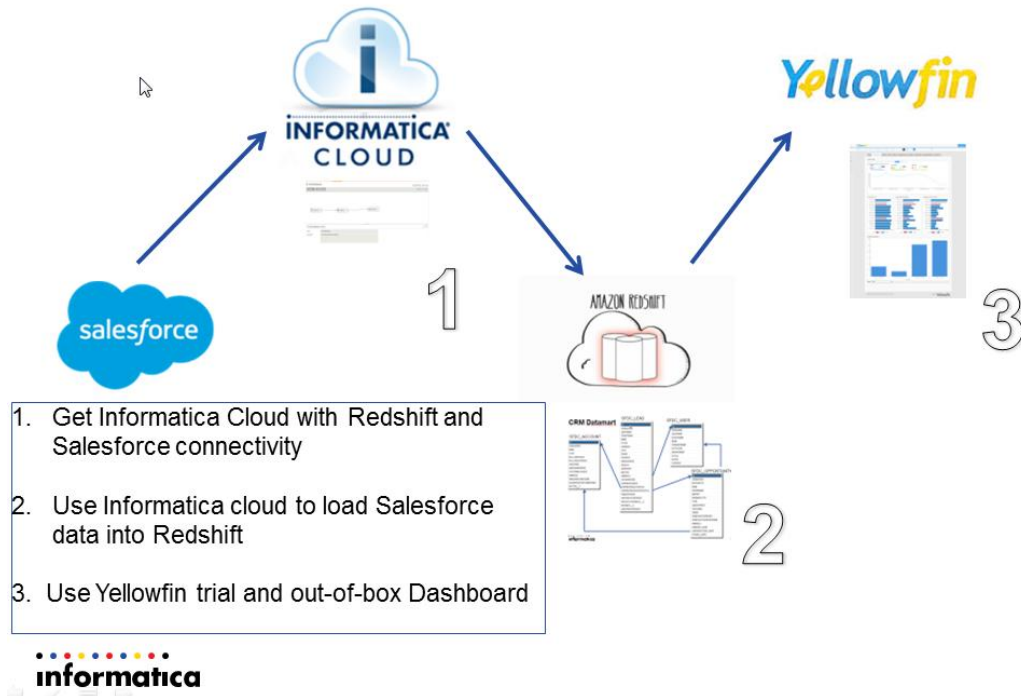


Introduction

The dashboard prototype using Informatica Cloud + Yellowfin allows you to view your Salesforce data using Yellowfin dashboard in a few minutes.

Informatica Cloud + Yellowfin Prototype



The components of the prototype are

1. Informatica Cloud with Redshift and Salesforce connectivity
2. Salesforce to Redshift Quickstart bundle on Informatica Cloud
3. Yellowfin on AWS
4. Yellowfin dashboard

This user guide contains the steps to implement the prototype.

Prerequisites

The following information is needed before you start implementing up the prototype

1. Salesforce login details

2. Redshift login details with name of the associated S3 bucket

Step 1: Setup Informatic Cloud Trial

After signing up for the Informatica Cloud Trial create the following connections

1. Salesforce Connection.
2. AWS Redshift Connection.

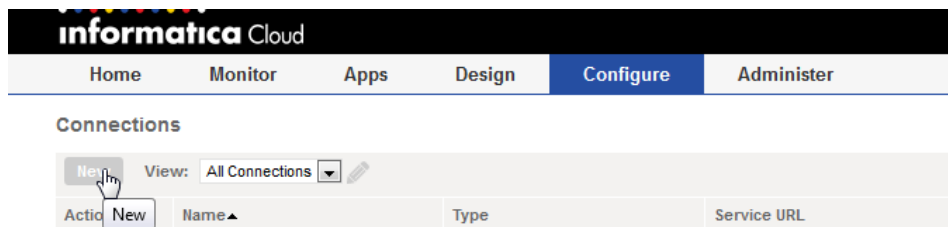
Salesforce connection

Deploy Salesforce Connection

1. Log in to Informatica Cloud to deploy the Salesforce connector
2. Go to Configure → Available Connectors
3. Browse through the list of available connectors to locate Salesforce connector
4. Click on “Free Trial” to deploy Salesforce connector

Configure Salesforce Connection

1. Go to Configure → Connections
2. Click New



3. Choose “Salesforce” for connection Type, fill in the login details

New Connection

Connection Details

Connection Name:*

Description:

Type:*

Salesforce

Salesforce Connection Properties

User Name:*

Password:*

Security Token: ?

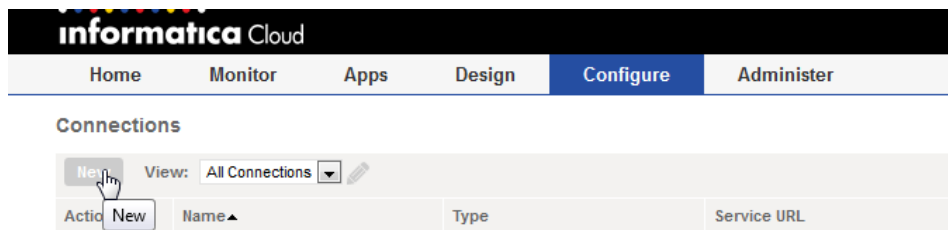
Service URL:*

Use the below YouTube video to configure a Salesforce connection

<https://www.youtube.com/watch?v=vbw8OQJfRQ8>

Configure Resdhift Connection

1. Go to Configure → Connections
2. Click New



3. Choose “Amazon Redshift” for connection Type, fill in the login details

New Connection

OK Cancel Test

Connection Details

Connection Name:*

Description:

Type: AmazonRedshift (Informatica Cloud) ▼

AmazonRedshift Connection Properties

Runtime Environment: ? Select... ▼

Username:*

Password:*

Schema: public

AWS Access Key ID:*

AWS Secret Access Key:*

Master Symmetric Key:

Cluster Node Type: dw1.xlarge ▼

Number of Nodes in the Cluster:*

Jdbc URL:*

Step 2: Use Informatic Cloud load Salesforce data in Redshift

1. Install Informatica Cloud bundle “Salesforce to Redshift Quickstart bundle” by following the below steps
 - a. Go to Configure → Available Bundles

- b. Browse through the list of available Bundles to locate the needed bundle
 - c. Click on "Install" to deploy the bundle
2. The Bundle contains 4 mappings. Configure mapping configuration task for each of the mapping

Bundle Contents		
Object Name	Object Type	Description
 Load_sfmc_account_to_redshift	Mapping	This cloud mapping is used to extract the data fro...
 Load_sfmc_user_to_redshift	Mapping	This cloud mapping is used to extract the data fro...
 Load_sfmc_lead_to_redshift	Mapping	This cloud mapping is used to extract the data fro...
 Load_sfmc_opportunity_to_redshift	Mapping	This cloud mapping is used to extract the data fro...

3. For each of the mapping configuration tasks provide the parameter values as shown below

Load Salesforce Account to Redshift

- a. Go to Apps → Mapping Configuration
- b. Click New
- c. Provide Task Name "load account"
- d. Choose Run environment
- e. Select mapping "Load_sfmc_account_to_redshift"
- f. Click Next
- g. Specify the Salesforce connection to use

 **New Mapping Configuration Task (load account)**

1 Definition 2 Sources 3 Targets 4 Schedule

< Previous Next > Save Cancel

Source Parameter Details

SFDC_CONNECTION Connection:* Bharath_SFDC_Final View... New... Advanced...

- h. Click Next
- i. Specify the Redshift connection to use

 **New Mapping Configuration Task (load account)**

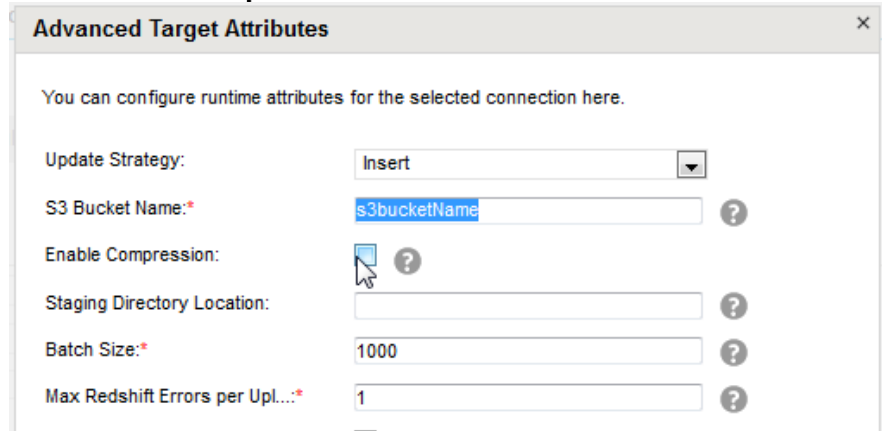
1 Definition 2 Sources 3 Targets 4 Schedule

< Previous Next > Save Cancel Validate

Target Parameter Details

REDSHIFT_CONNECTION Connection:* bharath_redshift_connector View... New... Advanced...

- j. Click 'Advanced' settings for the connection
- k. Specify the S3 Bucket Name



Advanced Target Attributes

You can configure runtime attributes for the selected connection here.

Update Strategy:

S3 Bucket Name:*

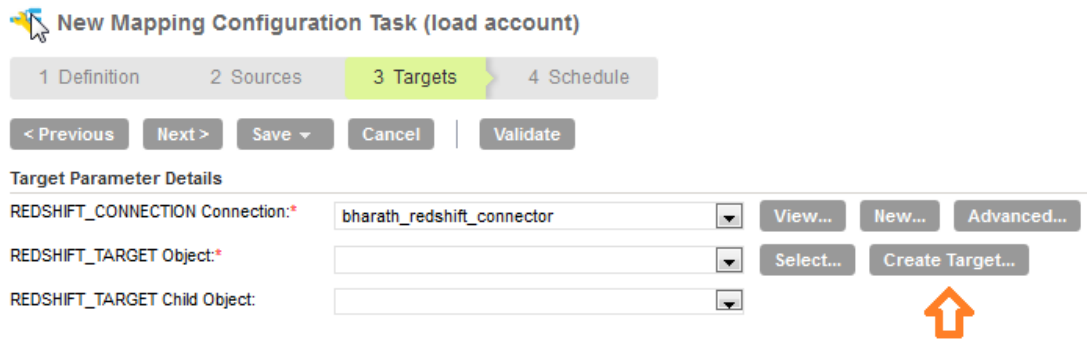
Enable Compression: ☐

Staging Directory Location:

Batch Size:*

Max Redshift Errors per Upl...:*

- l. Click “Create Target”



New Mapping Configuration Task (load account)

1 Definition 2 Sources 3 Targets 4 Schedule

< Previous Next > Save Cancel Validate

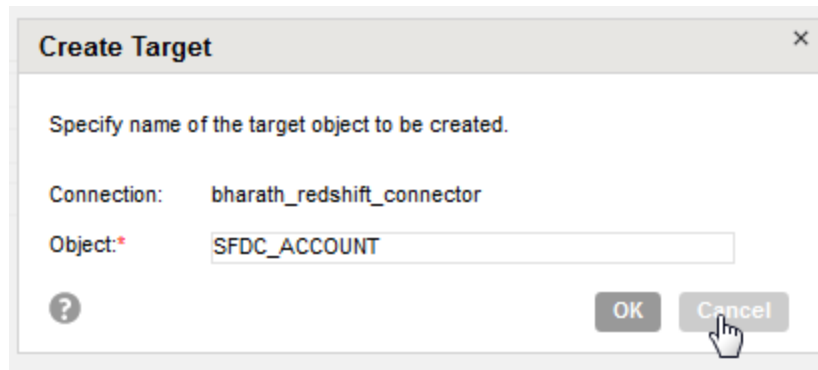
Target Parameter Details

REDSHIFT_CONNECTION Connection:* View... New... Advanced...

REDSHIFT_TARGET Object:* Select... Create Target...

REDSHIFT_TARGET Child Object:

- m. Specify the object name “SFDC_Account”



Create Target

Specify name of the target object to be created.

Connection:

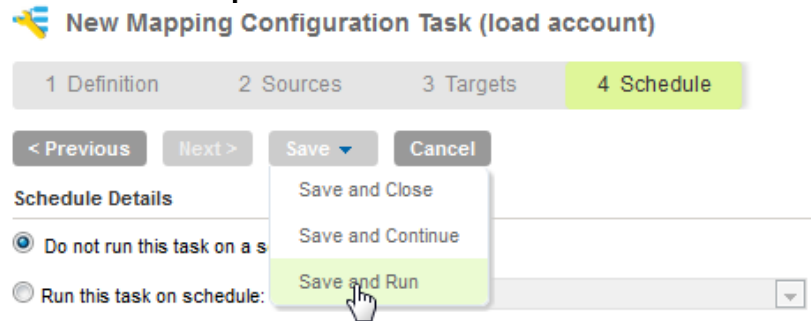
Object:*

OK Cancel

- n. Click Next
- o. Select Save → Save and Run



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Load Salesforce User to Redshift

- Go to Apps → Mapping Configuration
- Click New
- Provide Task Name "load user"
- Choose Run environment
- Select mapping "Load_sfmc_user_to_redshift"
- Click Next
- Specify the Salesforce connection to use
- Click Next
- Specify the Redshift connection to use
- Click 'Advanced' settings for the connection
- Specify the S3 Bucket Name
- Click "Create Target"
- Specify the object name "SFDC_User"
- Click Next
- Select Save → Save and Run

Load Salesforce Lead to Redshift

- Go to Apps → Mapping Configuration
- Click New
- Provide Task Name "load user"
- Choose Run environment
- Select mapping "Load_sfmc_lead_to_redshift"
- Click Next
- Specify the Salesforce connection to use
- Click Next
- Specify the Redshift connection to use
- Click 'Advanced' settings for the connection
- Specify the S3 Bucket Name
- Click "Create Target"



informatica Marketplace

- m. Specify the object name "SFDC_Lead"
- n. Click Next
- o. Select Save → Save and Run

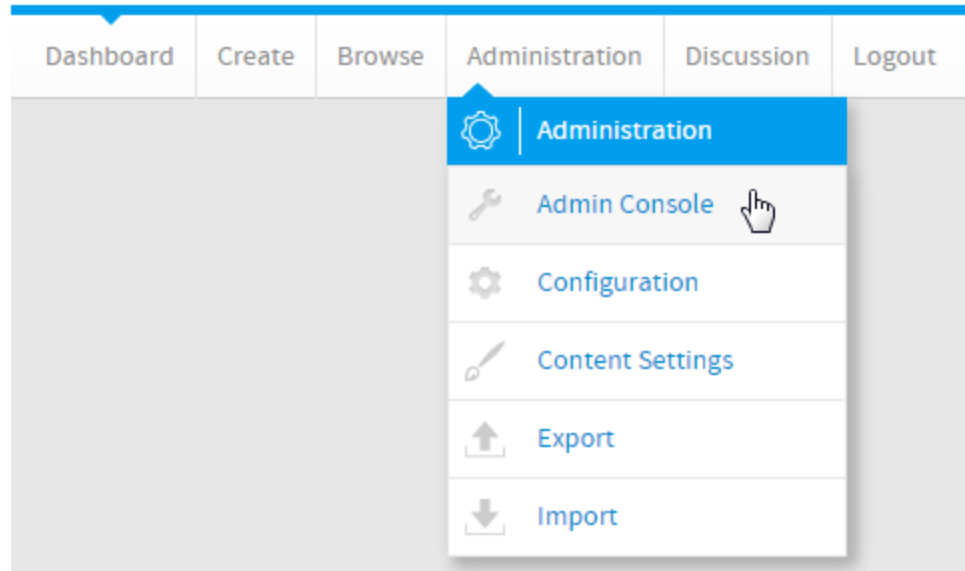
Load Salesforce Opportunity to Redshift

- a. Go to Apps → Mapping Configuration
- b. Click New
- c. Provide Taks Name "load user"
- d. Choose Run environment
- e. Select mapping "Load_sfdc_opportunity_to_redshift"
- f. Click Next
- g. Specify the Salesforce connection to use
- h. Click Next
- i. Specify the Redshift connection to use
- j. Click 'Advanced' settings for the connection
- k. Specify the S3 Bucket Name
- l. Click "Create Target"
- m. Specify the object name "SFDC_Opportunity"
- n. Click Next
- o. Select Save → Save and Run

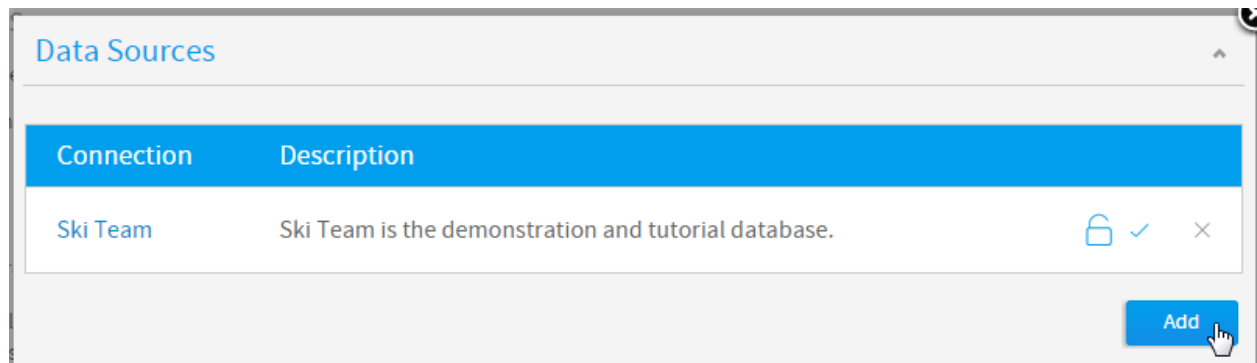
Step 3: Use Yellowfin Dashboard to view the data

Create the Redshift connection in Yellowfin (if not available)

- 1. Login to your Yellowfin instance.
- 2. Click on the **Administration link** in the main navigation bar and select **Admin Console**.



3. Expand the **Data Sources** list in the center panel of the Admin Console.
4. Click on the **Add** button to create a new connection.



5. Define the options based on your Redshift settings.

Connection

Connection Method:	JDBC	
Authentication:	Standard Authentication	
Database:	Amazon Redshift	
Include schema in SQL:	☒	
Host:	yf.ccjapojk5x0n.a	
Port:	5439	
Database:	yf	
User Name:	yf	
Password:	*****	
Schema:	None	

Connection Succeeded

Database:	PostgreSQL
Product Version:	8.0.2
Driver:	PostgreSQL Native Driver
Driver Version:	PostgreSQL 9.3 JDBC4 (build 1101)
Database Version:	8.0
Source Name:	Amazon Redshift

[Click here to test the connection again.](#)

Database Schema:

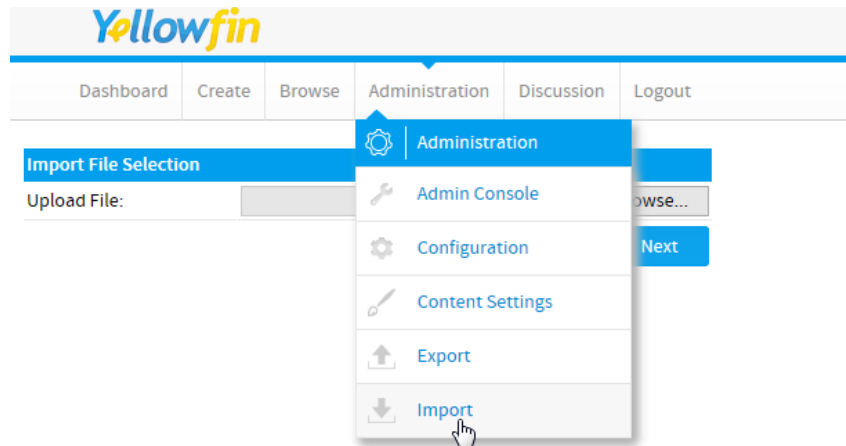
No tables found.

6. Test the connection and click **Save**.

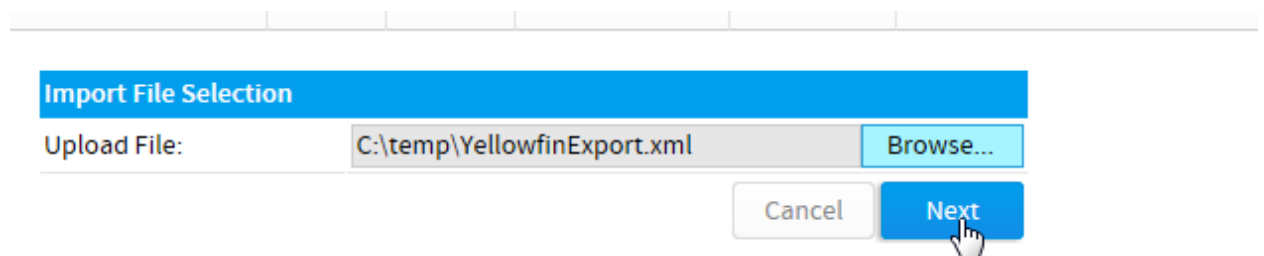
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Import the Yellowfin Dashboard

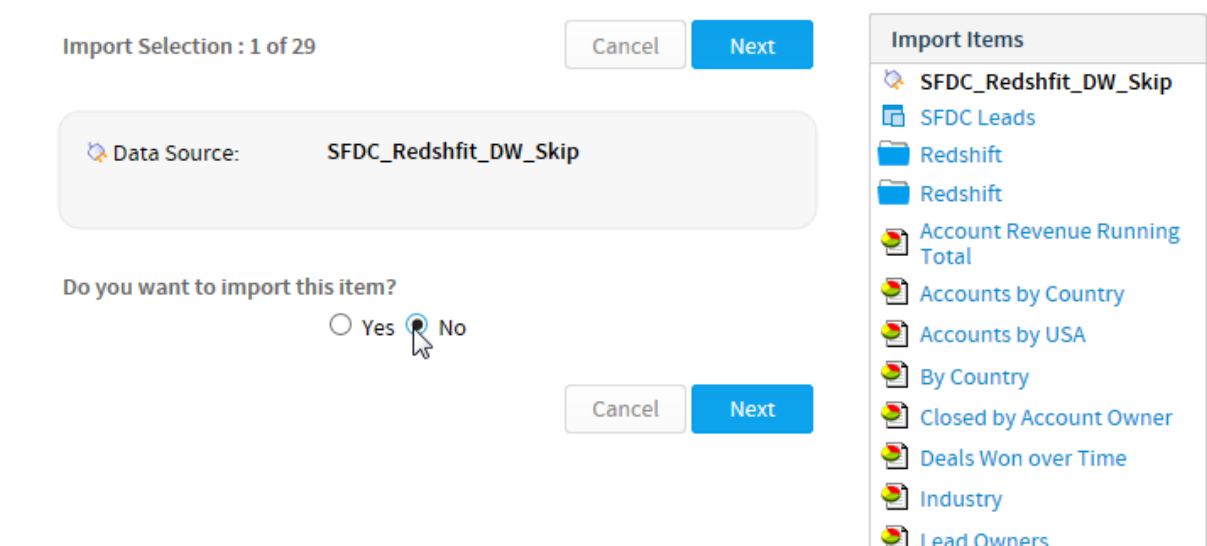
1. Login to your Yellowfin instance (if you are not logged in already).
2. Click on the **Administration** link in the main navigation bar and select **Import**.



3. Select the dashboard “YellowfinExport.xml” as shown below.



4. Skip importing data source at the first step. In the first step, user is told to import data source. Select the option no for data source as shown below.



5. At second step, select the redshift connection you want to use. Refer to following image.

Import Selection : 2 of 29 Cancel Back Next

Database View: **SFDC Leads**
New View

Do you want to import this item?

☒ Yes ☐ No

☒ Add new Database View

☐ Replace existing Database View

Data Source: Redshfit test

The Data Source has been skipped. Please choose another source.

Redshfit test ▼

Select the Redshift Connection you want to use

Cancel Back Next

Import Items

- SFDC_Redshfit_DW_Skip
- SFDC Leads
- Redshift
- Redshift
- Account Revenue Running Total
- Accounts by Country
- Accounts by USA
- By Country
- Closed by Account Owner
- Deals Won over Time
- Industry
- Lead Owners
- Lead Source
- Lead to Opportunity Ratio Dial
- Leads to Opportunity Ratio
- Opportunities Amount in

6. Import rest of the 29 objects to complete the import.

Import Selection : 3 of 29 Cancel Back Next

Category: **Redshift**

Do you want to import this item?

☒ Yes ☐ No

☒ Add new category

☐ Replace existing category

Cancel Back Next

Import Items

- SFDC_Redshfit_DW_Skip
- SFDC Leads
- Redshift
- Redshift
- Account Revenue Running Total
- Accounts by Country
- Accounts by USA
- By Country
- Closed by Account Owner
- Deals Won over Time
- Industry
- Lead Owners
- Lead Source
- Lead to Opportunity Ratio Dial
- Leads to Opportunity Ratio