



Informatica® Cloud Application Integration  
May 2018

# Getting Started

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# CHAPTER 1

## Dummy - Learning

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## Demos and Training Videos

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## Tutorials

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## CAI Community

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# CHAPTER 2

## Quick Start

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## System Requirements

Use one of the following browsers when you work with Application Integration:

- Google Chrome version 59 and higher
- Mozilla Firefox (64-bit) version 54 and higher
- Microsoft Internet Explorer Version 11

**Note:** To use Microsoft Internet Explorer 11, you must perform the following tasks:

- Enable cross-origin support (CORS) in the browser
- Modify the browser history settings

For more information about system requirements, see the Product Availability Matrix (PAM) for Application Integration. PAMs indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. You can access the PAMs on the Informatica Network at <https://network.informatica.com/community/informatica-network/product-availability-matrices/>.

## Modifying Browser History Settings

Ensure that the browser checks for a new page version each time you visit a page.

Perform the following steps to change browser history settings:

1. In Microsoft Internet Explorer, go to **Tools > Internet Options**.  
The **Internet Option** windows appears.
2. In the **General** tab, click **Settings** under the **Browsing history** section.
3. Under **Check for newer versions of stored pages**, select **Everytime I visit the webpage**.
4. Click **OK > OK**.

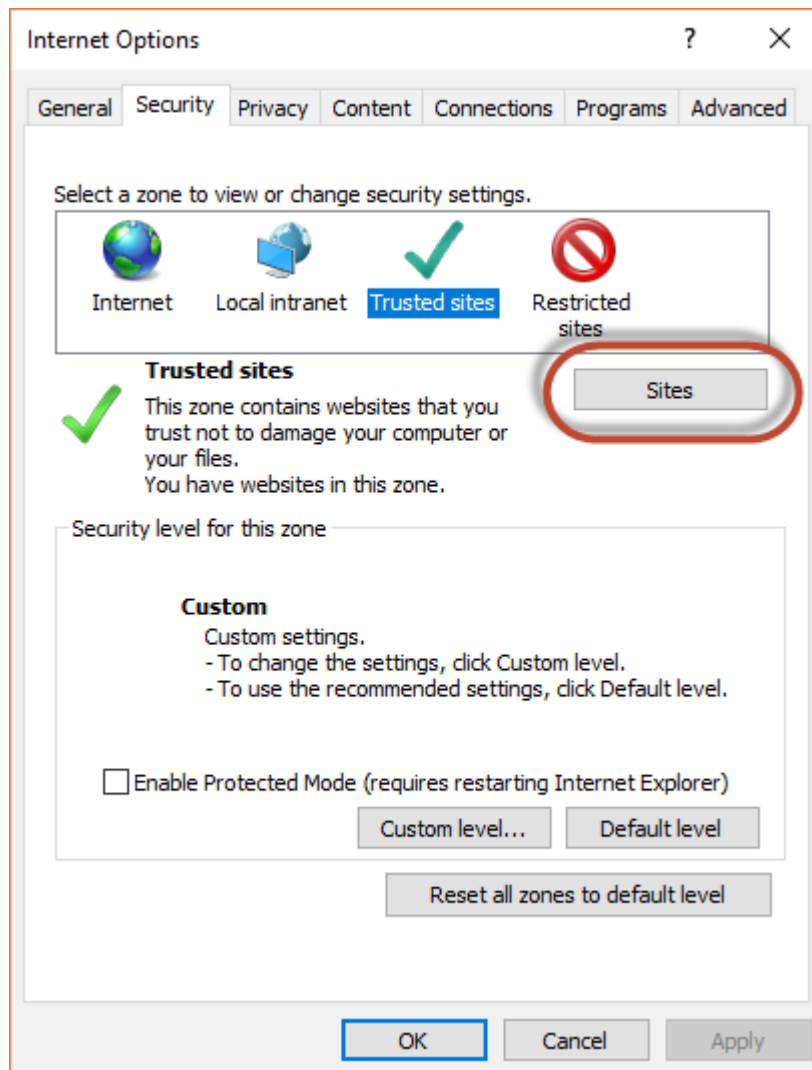
## Enabling CORS in Internet Explorer 11

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.

To enable CORS in Internet Explorer 11, complete the following steps:

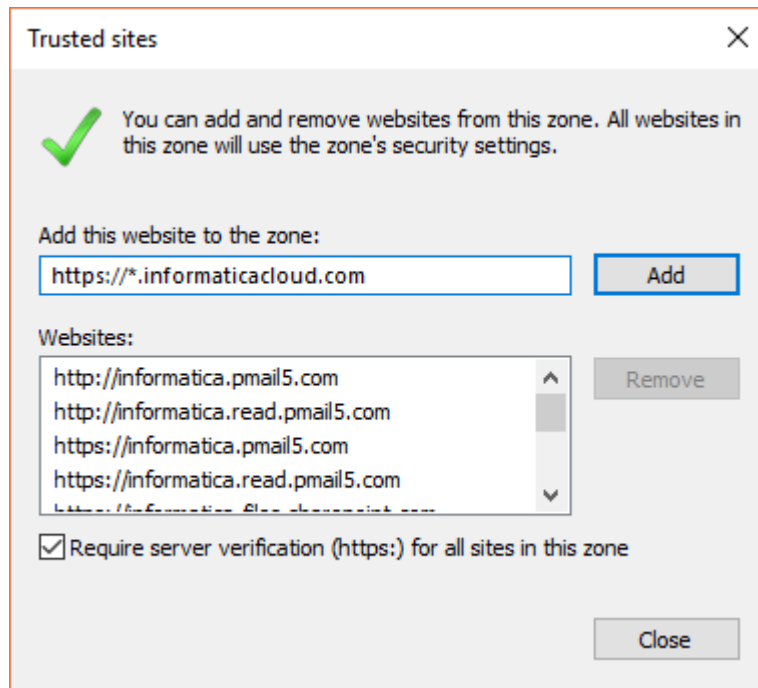
1. Open Internet Explorer 11.
2. On the **Tools** menu, select **Internet Options**.
3. On the **Security** tab, click **Trusted sites**, and then click **Sites**:



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

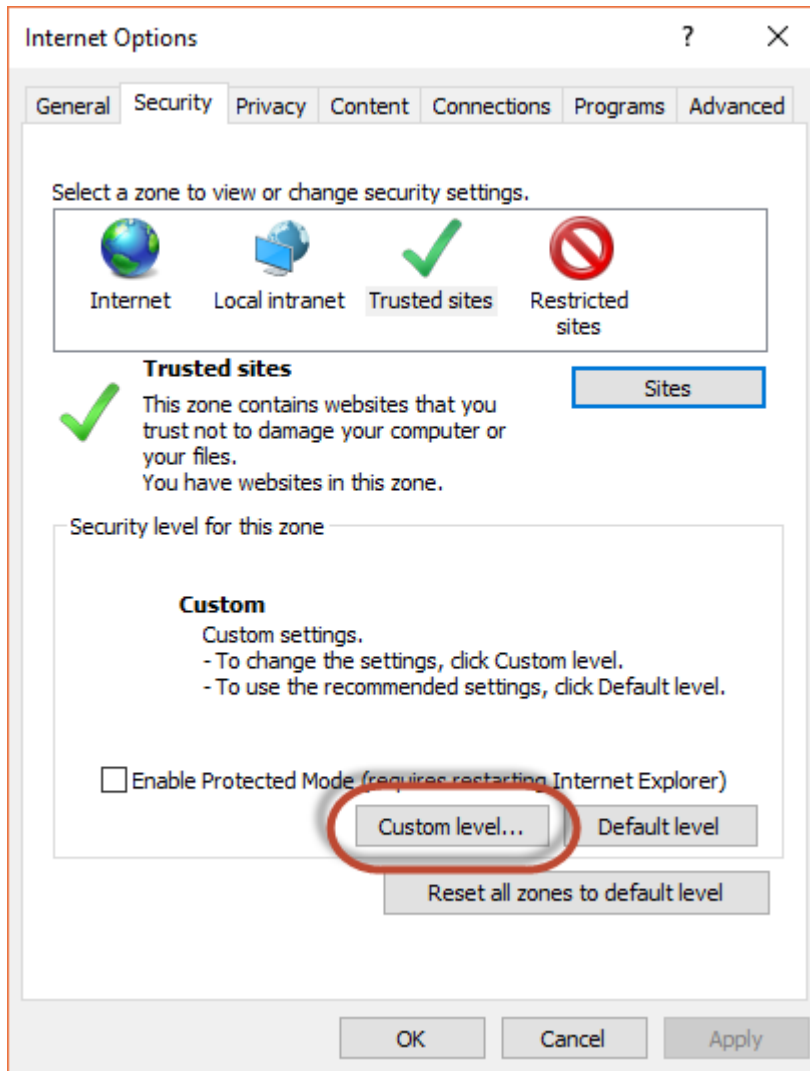


For example: `https://*.informaticacloud.com`:

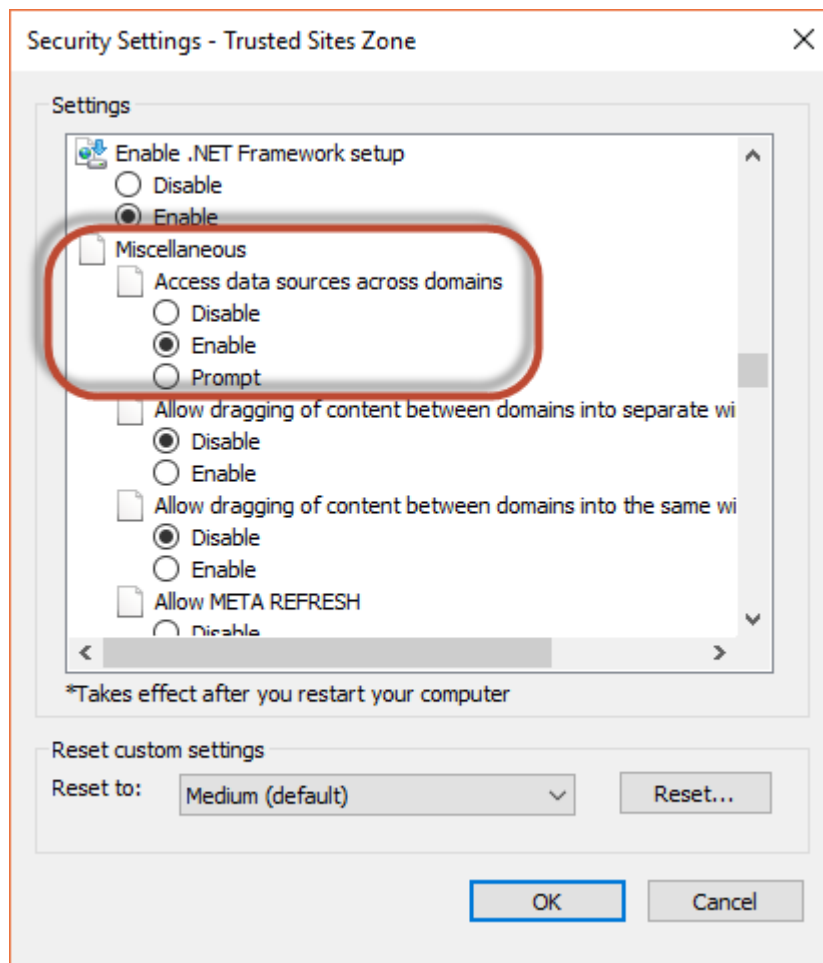


5. Click **Close**.

6. In the **Security level for this zone** area on the **Security** tab, click **Custom level**:



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



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

## Editing Your User Profile

Your user profile contains the details of your Informatica Intelligent Cloud Services user account.

You can update the following information in your profile:

- Email address
- Time zone (used in the job execution time stamps on the **Jobs** and **My Jobs** pages)
- Password

- Security question
1. Click the **User** icon in the top right corner of the Informatica Intelligent Cloud Services window and then select **Profile**.
  2. On the **Profile** page, add or edit personal information such as your name, job title, phone number, email address, and time zone.
  3. Optionally, change your password or security question.
  4. Click **Save**.

## Switching to a Different Organization

If you are an administrator in a parent organization or a user in a parent organization that has privileges to view sub-organizations, you can switch among organizations. You do not have to log out and log back in to Informatica Intelligent Cloud Services.

To switch to a different organization:

- From the **Organization** menu in the upper right corner, select the organization that you want to view.

## 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.

**Note:** The **Explore** page does not support the following characters:

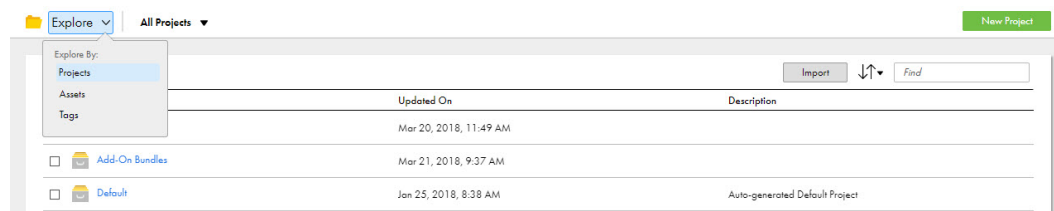
# ? ' | { } " ^ & [ ] / \

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

## Creating Projects and Project Folders

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

To create a project, go to the **Explore** page and select to explore by projects, and then click **New Project**.



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

Name	Type	Updated On	Description	Status
Connections	Folder	Feb 3, 2018, 1:32 AM		
Process Objects	Folder	Feb 3, 2018, 1:32 AM		
Processes	Folder	Feb 3, 2018, 1:32 AM		
Service Connectors	Folder	Feb 3, 2018, 1:32 AM		

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*.

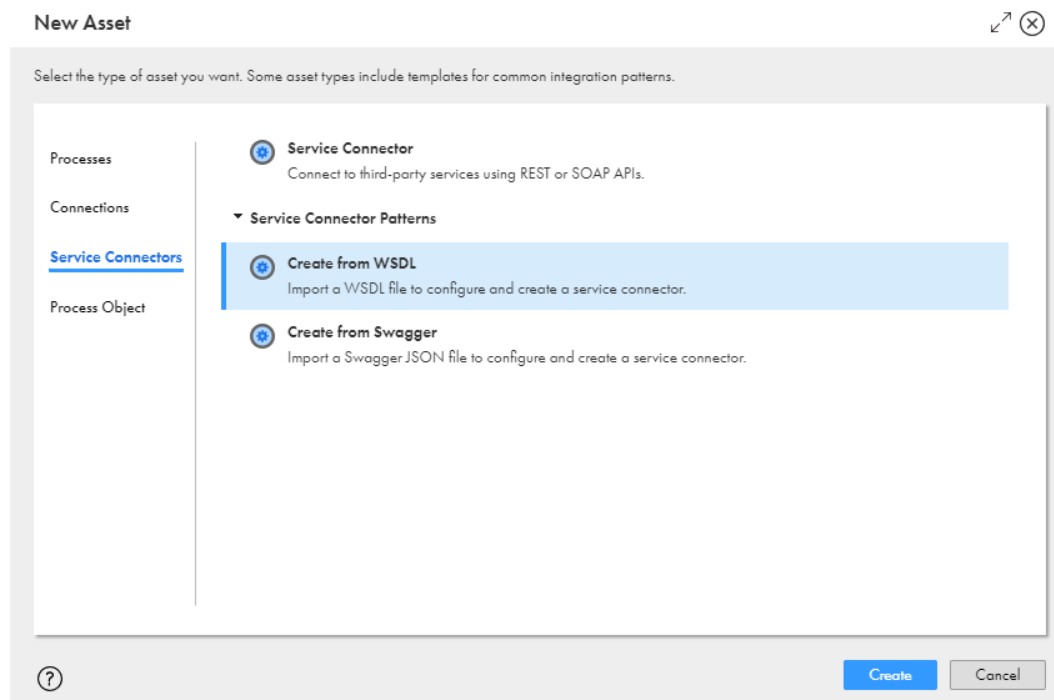
## Creating Assets

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.

To create an asset from a template, click **New**, select the asset type, and then select the appropriate template.

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, **Service Connectors** is selected.
2. Select one of these options to create a custom asset. Since **Service Connectors** is selected on the left, this area lists the service connector types that you can create.

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

# Getting Started with Informatica Cloud Application Integration

You can create an Application 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 Cloud Product Availability Matrix for operating systems, databases, and other systems that Application Integration supports.

## Step 2. Configure a Runtime Environment

A runtime environment is the execution platform for running tasks. A runtime environment consists of one or more Secure Agents. A Secure Agent is a lightweight program that runs tasks and enables secure communication across the firewall between your organization and Application Integration. You must have at least one runtime environment in each organization so that users in the organization can run tasks.

### 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 such as Amazon Web Services or Microsoft Azure.

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

## Step 3. Create a Connection

Before you can use Application Integration processes, you need to create a connection. When you configure the connection, you specify the connector that enables the exchange of data between Application Integration and the application you want to connect to. 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 which enables the exchange of data between Salesforce and Application Integration.

## Step 4. Create your Project

Organize your Application Integration projects in folders that contain assets such as mappings, tasks, and taskflows. Create a project folder and folders to contain the assets you need for your project.

After you set up folders, create your project assets. Assets include the following objects:

- Processes
- Connections
- Process objects
- Service Connectors

## CHAPTER 3

# Installing Secure Agents

You can install Secure Agents on Windows or Linux.

## Secure Agent Installation on Windows

On Windows, the Secure Agent runs as a Windows service. When you install the Secure Agent, you also install the Informatica Cloud Secure Agent Manager.

By default, the Secure Agent starts when you start Windows. Use the Secure Agent Manager to stop and restart the Secure Agent. You can also use the Secure Agent Manager to check the Secure Agent status and configure proxy information.

You can launch the Secure Agent Manager from the Start menu or desktop icon. When you close the Secure Agent Manager, it minimizes to the Windows taskbar notification area for quick access.

When you install a Secure Agent, you perform the following tasks:

1. Verify that the machine where you install the Secure Agent meets the minimum requirements.
2. Download the Secure Agent installer files.
3. Install and register the Secure Agent.

## Secure Agent Requirements on Windows

You can install the Secure Agent on any machine that has internet connectivity and can access Informatica Intelligent Cloud Services.

Verify the following requirements before you install the Secure Agent on Windows:

- Verify that the machine on which you install the Secure Agent uses a supported operating system. For the list of supported operating systems for the Secure Agent, see the Product Availability Matrix (PAM) for Informatica Intelligent Cloud Services on Informatica Network:  
<https://network.informatica.com/community/informatica-network/product-availability-matrices/overview>
- Verify that the account you use to install the Secure Agent has access to all remote directories that contain flat source or target files.
- Verify that no other Secure Agent is installed on the machine. If another Secure Agent is installed on the machine, you must uninstall it first.

For more information about Secure Agent requirements, contact Informatica Global Customer Support.

## Configure IP Address Ranges

If your organization uses a protective firewall, include the Informatica Intelligent Cloud Services URL in the list of approved hosts or include the Informatica Intelligent Cloud Services IP address ranges in the list of approved IP addresses. This ensures that the Secure Agent can perform all necessary tasks through the firewall.

The whitelist of URLs and IP addresses varies according to your data center, which is also called a POD (Point of Deployment). You can identify your POD through the URL that appears when you open any service in Informatica Intelligent Cloud Services. The first few characters of the URL string identify the POD.

For example:

- If the URL starts with `na1.dm-us.informaticacloud.com`, your POD is NA1.
- If the URL starts with `na2.dm-us.informaticacloud.com`, your POD is NA2.
- If the URL starts with `usw3.dm-us.informaticacloud.com`, your POD is USW3.
- If the URL starts with `use4.dm-us.informaticacloud.com`, your POD is USE4.

You can find the whitelists of Informatica Intelligent Cloud Services URLs and IP addresses for different PODs in KB article 524982 on Informatica Network:

<https://kb.informatica.com/faq/7/Pages/20/524982.aspx>

## Secure Agent Permissions

A Secure Agent requires certain permissions to transfer data between sources and targets.

When you install a Secure Agent on Windows, the Secure Agent must be part of the local Administrators group.

## Configuring Windows Settings

Before you use the Secure Agent on Windows, configure proxy settings and a Windows Secure Agent service login.

You can configure proxy settings in Secure Agent Manager. Configure a login for the Windows Secure Agent service on Windows.

**Note:** If you use the Secure Agent for Informatica Cloud Data Wizard, you do not need to configure proxy settings or a Windows service login for the Secure Agent.

## Download the Windows Secure Agent Installer

Download the Secure Agent installer from Informatica Intelligent Cloud Services. You can download and run the Secure Agent on any machine that meets the minimum requirements.

1. Open Administrator and select **Runtime Environments**.
2. On the **Runtime Environments** page, click **Download Secure Agent**.
3. Select the operating system on which you will run the Secure Agent, and then click **Download**.
4. Save the installation wizard to the machine where you want to run the Secure Agent.

The name of the Windows Secure Agent installation file is `agent64_install.exe`



## Install and Register the Secure Agent on Windows

After you download the Secure Agent installer, you can install it. You can install one Secure Agent on a machine. After the installation completes, you can register the Secure Agent. After you complete the registration, the Secure Agent Manager displays the Secure Agent status.

Verify that no other Secure Agent is installed on the machine. If there is, you must uninstall it.

1. Open the directory where you downloaded `agent64_install.exe`, and double-click the file.
2. Choose the installation folder and click **Next**.
3. Review the pre-installation summary and click **Install**.
4. After the installer completes, click **Done**.

A registration page appears.

5. Enter your Informatica Intelligent Cloud Services user name and password and click **Register**.

The Secure Agent starts, and the **Informatica Cloud Secure Agent** window displays the status of the Secure Agent. You can stop and start the agent and change the proxy settings in this window.

6. Close the Secure Agent Manager.

The Secure Agent Manager minimizes to the taskbar and continues to run as a service until stopped.

## Configure the Proxy Settings on Windows

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. The Secure Agent installer configures the proxy server settings for the Secure Agent based on settings configured in the browser. You can change the proxy server settings through the Secure Agent Manager.

Contact your network administrator for the correct proxy settings.

1. In the Secure Agent Manager, click **Proxy**.
2. To enter proxy server settings, click **Use a Proxy Server**.
3. Enter the following information:

Field	Description
Proxy Host	Required. Host name of the outgoing proxy server that the Secure Agent uses.
Proxy Port	Required. Port number of the outgoing proxy server.
User Name	User name to connect to the outgoing proxy server.
Password	Password to connect to the outgoing proxy server.

4. Click **OK**.

The Secure Agent Manager restarts the Secure Agent to apply the settings.

## Configure a Login for a Windows Secure Agent Service

On Windows, configure a network login for the Secure Agent service. The Secure Agent can access the network with the privileges and permissions associated with the login.

Configure a login for the machine on which the Secure Agent is installed to allow the Secure Agent to access directories to configure and run tasks. When you configure connections, configure tasks, and run tasks that use Flat File or FTP/SFTP connection types, the Secure Agent might require read and write permissions on the related directories.

For example, to browse to a directory to configure a Flat File or FTP/SFTP connection, the Secure Agent login might require permission to access the directory. Without a Secure Agent login with the appropriate permissions, Informatica Intelligent Cloud Services cannot display the directory in the **Browse for Directory** dialog box.

1. Go to the **Services** window from the Windows Administrative tools.
2. In the **Services** window, right-click the Informatica Cloud Secure Agent service and choose **Properties**.
3. In the **Properties** dialog box, click the **Log On** tab.
4. To configure a login, select **This Account**.
5. Enter an account and password.  
Use an account with the required privileges and permissions for the network security defined for the domain. By default, the account format is <domain name>\<user name>.
6. Click **OK**.
7. In the **Services** window, restart the Secure Agent service for the changes to take effect.

## Secure Agent Installation on Linux

On Linux, the Secure Agent runs as a process. You can use a shell command line to install, register, start, stop, and uninstall the Secure Agent.

You can also use the shell command line to check the Secure Agent status.

When you install a Secure Agent, you perform the following tasks:

1. Verify that the machine where you install the Secure Agent meets the minimum requirements.
2. Download the Secure Agent installer files.
3. Install and register the Secure Agent.

## Secure Agent Requirements on Linux

You can install the Secure Agent on any machine that has internet connectivity and can access Informatica Intelligent Cloud Services. Before you install the Secure Agent on Linux, verify the system requirements.

Verify the following requirements before you install the Secure Agent on Linux:

- Verify that the machine on which you install the Secure Agent uses a supported operating system. For the list of supported operating systems for the Secure Agent, see the Product Availability Matrix (PAM) for Informatica Intelligent Cloud Services on Informatica Network:  
<https://network.informatica.com/community/informatica-network/product-availability-matrices/overview>
- Verify that the machine where you install the Secure Agent has at least 500 MB of free disk space.

- The account that you use to install the Secure Agent must have access to all remote directories that contain flat source or target files.
- If you use PowerCenter, install the Secure Agent using a different user account than the account you used to install PowerCenter.

Informatica Intelligent Cloud Services and PowerCenter use some common environment variables. If the environment variables are not set correctly for Informatica Intelligent Cloud Services, your jobs might fail at run time.

For more information about Secure Agent requirements, contact Informatica Global Customer Support.

## Download the Linux Secure Agent Installer

Download the Secure Agent installer from Informatica Intelligent Cloud Services. You can download and run the Secure Agent on any machine that meets the minimum requirements.

1. Open Administrator and select **Runtime Environments**.
2. On the **Runtime Environments** page, click **Download Secure Agent**.
3. Select the operating system on which you will run the Secure Agent, and then click **Download**.
4. Save the installer to a path on the machine where you want to run the Secure Agent.

**Note:** If the path contains spaces, the installation might fail.

The name of the Linux Secure Agent installation file is `agent64_install.bin`.

## Install and Register the Secure Agent on Linux

You can install one Secure Agent on a machine. You must uninstall the existing Secure Agent from the machine before you install a Secure Agent. After the installation completes, start the Secure Agent, then use your Informatica Intelligent Cloud Services user name and password to register the Secure Agent.

1. From a shell command line, navigate to the directory where you downloaded the file and enter the following command:

```
agent64_install.bin -i console
```

**Note:** If you install the Secure Agent on Linux, do not include spaces in the directory path. If you include spaces, the Secure Agent installation might stop responding.

2. When the installer completes, navigate to the following directory:

```
<Secure Agent installation directory>/apps/agentcore
```

3. To start the Secure Agent, enter the following command:

```
infaagent startup
```

4. After the Secure Agent starts, register the Secure Agent. In the same directory, enter the following command using your Informatica Intelligent Cloud Services user name and password:

```
consoleAgentManager.sh configure <username> <password>
```

You can check the registration status of a Secure Agent using the following command:

```
consoleAgentManager.sh isConfigured
```

## Configure the Proxy Settings on Linux

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.

The Secure Agent installer configures the proxy server settings for the Secure Agent based on settings configured in the browser. You can update the proxy server settings defined for the Secure Agent from the command line.

To configure the proxy server settings for the Secure Agent on a Linux machine, use a shell command that updates the `proxy.ini` file. Contact the network administrator to determine the proxy settings.

1. Navigate to the following directory:

```
<Secure Agent installation directory>/apps/agentcore
```

2. To update the `proxy.ini` file, enter the following command:

```
consoleAgentManager.bat configureProxy <proxy host> <proxy port> <proxy user name>  
<proxy password>
```

3. Restart the Secure Agent.

## CHAPTER 4

# Dummy - Resources

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## Informatica Resources

### 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 Data Integration editions and applications as well as information about other Informatica Cloud integration services.

### Informatica Intelligent Cloud Services Communities

Use the Informatica Intelligent Cloud Services Community to discuss and resolve technical issues in Data Integration. 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>

To find resources on using Application Integration (the Informatica Cloud Real Time service), access the community at:

<https://network.informatica.com/community/informatica-network/products/cloud-integration/cloud-application-integration/content>

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/community/collections/cloud\\_integration](https://marketplace.informatica.com/community/collections/cloud_integration)

## Informatica Intelligent Cloud Services Trust Site

Subscribe to the Informatica trust site for upgrade, maintenance, and incident notifications.

[Status.Informatica.com](https://status.informatica.com) displays the production status of all the Informatica cloud products. All maintenance updates are posted to this status 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 a single component, a single incident, or the site as a whole. Subscribing to the site as a whole is the best way to be certain you never miss an update. To subscribe, go to <http://status.informatica.com> and click **SUBSCRIBE TO UPDATES**. You can then 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 Customer Support Center by telephone or online.

For online support, click **Submit Support Request** in Informatica Intelligent Cloud Services. You can also use Online Support to log a case. Online Support requires a login. You can request a login at <https://network.informatica.com/welcome>.

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>.

## Data Integration Connector Documentation

You can access documentation for Data Integration Connectors at the Informatica Cloud Community: <https://network.informatica.com/cloud/index.htm>

## Informatica Knowledge Base

Use the Informatica Knowledge Base to search Informatica Network for product resources such as documentation, how-to articles, best practices, and PAMs.

To access the Knowledge Base, visit <https://kb.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).

## Other IICS Services

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