

Cloud Connector Template

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INFORMATICA CLOUD <CONNECTOR> CONNECTOR USER GUIDE

Introduction to <Connector> Connector

Provide general information about the Connector.

NOTE ABOUT EXAMPLES

Include an example *only* if you have something specifically related to customer use case. If you have just a short paragraph, you can include it in the overview topic. If you have a few paragraphs, you can include it as a separate topic.

H1 XYZ Connector Overview (Required)

Intro the basic functionality of the connector.

SAMPLE TEXT

NetSuite Connector enables you to securely read data from or write data to NetSuite. NetSuite sources and targets represent records in NetSuite. NetSuite records are tables that correspond to the tabs and other user interface elements on the NetSuite website. For example, the Account record contains information for the fields in the NetSuite Accounts page.

H1 XYZ Connector Task and Object Types (Required)

After looking at multiple connector docs, I found it very awkward to continually read the types of tasks and objects in so many different topics. It also seems inefficient for writers to continually put this in and even more inefficient for users to find the information.

I'm proposing a table where we can have reference to this.

SAMPLE TEXT

The following table lists the XYZ object types that you can include in Informatica Cloud tasks:

Task Type	Source	Target	Lookup
Data synchronization	Yes	Yes	No
Mapping configuration	Yes	Yes	No
PowerCenter	Yes	Yes	Yes

H1 XYZ Objects (Based on content)

The intro chapter can be a good place to describe the third-party objects that can apply to multiple tasks and/or as different object types, such as source and target.

Use this topic in the following situation:

- You have a limited amount of information to share with customers.
- The information applies to multiple task types (such as data synchronization and mapping) and/or object types (such as source and target).

SAMPLE TEXT

You can work with the following types of NetSuite objects in Informatica Cloud:

Standard objects

The standard object type for NetSuite. Standard objects, such as Accounts and Customer, are packaged within NetSuite.

Custom objects

A standard object that is customized to hold additional data. NetSuite system administrators and users with required permissions can define custom fields for standard and custom records.

Saved searches

A reusable search definition that can include one or more advanced search criteria and search results.

You can use NetSuite standard objects, custom objects, and saved searches as a source. You can use NetSuite standard objects and custom objects as a target.

H1 Introduction to XYZ

Provide a paragraph or two that describe the third party and any concepts that are relevant to the user who uses the connector.

SAMPLE TEXT

Marketo is a marketing automation software that you can use to create, automate, and measure campaigns across marketing channels with prospects and customers.

Use Marketo to stimulate interest of leads in a product or service. Leads are qualified prospects who show buying behavior. You can track and measure the interest that a lead shows in a product or service. Marketo gives detailed statistics on leads and their activities on Marketo pages, emails, and websites.

Marketers gain analytic insights to understand which lead activity results in opportunities. Marketo assets include lists that help you understand which of the leads you want to target with the campaign. Marketo helps respond to the targeted leads through dynamically generated and personalized communications in real time. Marketing teams can use Marketo to manage marketing activities across global teams in a single centralized marketing calendar.

H1 Administration of XYZ Connector (required)

Include any admin task that is required before a developer can create and run the tasks. This can include the following types of requirements:

- Provide access to Secure Agent directory for files such as staging, success, and error files.
- Create third party config files.
- Get security keys from third party.

XYZ Connections

REUSE

We are still putting the connection properties in the User Guide. Put these topics in shared area in the repository so you can include the topic reference in both chapter maps.

H1 XYZ Connection Overview

Include a simple intro to the connection properties.

Note: We do not need to specify the different task types or object types, as this information is in the intro chapter.

Sample text

Create an XYZ connection to access XYZ data from Informatica Cloud. You can create a connection on the Connections page or when you create a task. After you create a connection, it becomes available to all users who have access to the organization.

H1 XYZ Connection Properties

We don't need to put a short description in here. Just the lead-in to the table.

H1 Rules and Guidelines for XYZ Connections

If you have specific R&G for the connections, put them here. Verify that it is specific to the connection object and not to processing a task when the Secure Agent connects to the third party.

XYZ Objects (based on content)

If a significant amount of information about the third-party objects or third-party object processing is common to more than one task type or object type, you can create a separate chapter to include the information.

Sample reference

Refer to the following Connector guides to see different possible structures for this chapter.

- Marketo REST. Structured to show third-party object types.
- Amazon Redshift. Structured to show third-party processing information.

<Task type> Tasks with XYZ

If we do not have the common task and object information in the intro chapter or in a separate chapter, we can include it in this chapter.

Information that is specific to sources belongs in the Sources topic. Likewise for the target information. If you need to document information that is common to sources and targets, consider the following guidelines:

- If you have a small amount of shared information, you can use conrefs to include in both topics.
- If you have a significant amount of shared information, you can create a chapter for the objects.

Note: We do not need to specify the different task types or object types, as this information is in the intro chapter.

H1 XYZ Sources in <Task type> Tasks

Include some conceptual information in this topic related to specific third-party functionality for the task.

H2 XYZ Source Properties in <Task type> Tasks

Create reference tables to describe the properties.

H2 Rules and Guidelines for XYZ Sources in <Task type> Tasks

Keep the R&G topics to a minimum. Be careful *not* to use this topic as a quick way to document conceptual information.

H1 XYZ Targets in <Task type> Tasks

Include some conceptual information in this topic related to specific third-party properties for the task.

H2 XYZ Target Properties in <Task type> Tasks

Create reference tables to describe the properties.

H2 Rules and Guidelines for XYZ Targets in <Task type> Tasks

Keep the R&G topics to a minimum. Be careful *not* to use this topic as a quick way to document conceptual information.

H1 XYZ Lookups in <Task type> Tasks

If you can perform lookups to the third-party system, include a topic for lookups. There might not be a lot of content, and we might always use the same wording, but people look to the guides to find out this information, so we need to include it.

SAMPLE TEXT

When you configure field mappings in a data synchronization task, you can create a lookup to a NetSuite standard or custom object.

When you use a NetSuite object as a lookup, you do not need to configure specific NetSuite properties. You can use a custom field in a lookup condition if the field is filterable.

H1 Example <Connector> <Task type> Task (optional)

Include an example if you can get one that reflects actual customer requirements or use cases. If the only example is one that is used to test data movement in and out of the third party, you do not need to include it.

H1 Rules and Guidelines for <Connector> <Task type> Tasks (as needed)

You should rarely need this topic. Most of the rules and guidelines can fit with the object type, such as source or target. You can use conrefs for the R&Gs that apply to all object types.

Appendix: Data Type Reference**H1 Data Type Reference Overview**

Maybe we can abbreviate the text in the intro topic. The discussion about where data types appear belong in a different topic. This appendix should be purely reference.

SAMPLE TEXT -- REUSABLE

When Informatica Cloud reads source data, it converts the native data types to the comparable Cloud transformation data types before transforming the data. The transformation data types are internal data types based on ANSI SQL-92 generic data types. When Informatica Cloud writes to a target, it converts the transformation data types to the comparable native data types.

H1 XYZ and Transformation Data Types

Recommending that we drop the transformation data type description and move to either:

- A 2-column table with only data types.
- A 3-column table that contains the native data type description instead of the transformation data type description.

H1 Transformation Data Types

If we need transformation data type descriptions, we can include this reused topic in all guides.

STYLE COMMENTS***Reuse***

Create conrefs for the following items

- Common descriptions for properties. The descriptions might be reused within one guide or across multiple guides.
- Common tasks, such as the admin requirement to provide access to Secure Agent machines.
- Common functionality, such as brief descriptions of functionality that is shared across task types, but there is not enough information for a separate chapter.

Wording

Connector does not require an article. For example, write “Use Marketo REST Connector...” instead of “Use the Marketo REST Connector...”

Note wording for Secure Agent and runtime environments. Always use the content references that we have set up. This terminology has been through tech review, but the development is still evolving, and the terminology might change.