Adaptive Connector (Hosted)

The Adaptive Connector is an Extract, Transform and Load (ETL) script that extracts source data from your SaaS based source system and imports it to Adaptive Planning. Data can be imported to standard, modeled, and cube accounts, and to any level or version in your model.

The Connector extracts data from the source system using the source system's web service Application Programming Interface (or API). Extracted data are transformed per your business rules, then are imported to Adaptive Planning via Adaptive Insights' web service API. For periodic data such as general ledger actuals you specify the periods you wish to import.

Specification of Connector parameters is performed via user entry within the **Import** tab, **Import Data** sub-tab in your Adaptive Planning model. Extract, Transform, and Load logic is embedded within the Connector.
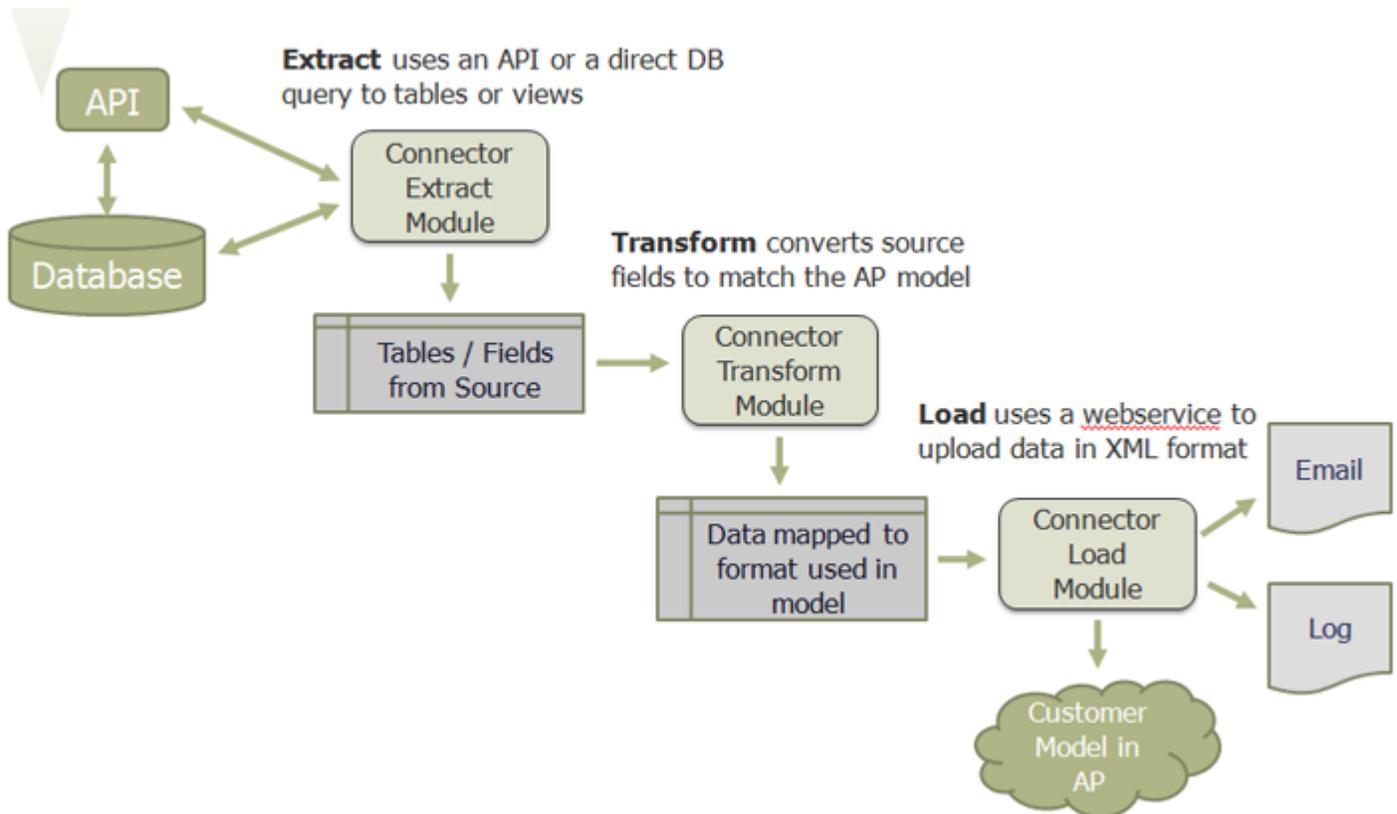

Figure 1: An overview of the Connector's actions

Running the Connector

This is an example; the exact configuration of the scripts and user entry page will vary with your source system and your specific business requirements.

1. Log in to your Adaptive Planning instance.
2. Click the navigation icon in the upper left. In the drop-down menu, select Integration, then under **Import, Import Data**.
   Figure 2 shows the **Import Data** screen with the **Custom Script** radio button.
3. Click the **Custom Script** radio button
   Figure 3 shows the **Import Data** screen after clicking the **Custom Script** radio button.

4. Click any of the **Custom Script** links.

    a. Figure 4 shows the user entry screen for the connector run. The sample import shows several user input fields. The specific fields will vary depending on the source system and user requirements.

    - User entry screen notes:
        - The entries made for each connector run are saved and populate the entry fields for the subsequent connector run.
        - The credentials can be those of any user that has full read access to the source system API.

5. Click **Run Script** at the bottom of the user entry page.

    a. The connector will run and there may be some warning messages.

    - There are two warning messages cases:
        - Warning messages are generated for each record from the source system for which the import level does not have a match in the **Import Level** column of the **Import Level Mappings** table. The **Import Level Mappings** table is on the **Import Level Mappings** screen.

6. The results of the connector run are shown on the **Import History** page, same as you find for manual imports, as shown on Figure 5. The FromWebservice.txt file is the import file (in XML request format) generated by the Connector.

i. Each warning message lists both the warning for Level and / or the warning for Account, so the warning Level or warning Account both must be checked in the Import Level Mappings table or the Import Account Mappings table.

Figure 2: Adaptive Planning Import Data Sub-Tab with Custom Script radio button called out.

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Figure 3: Adaptive Planning Import Data Sub-Tab after clicking the Custom Script radio button (sample connector scripts shown).

salesforce Connector

Enter the period for which to import data: None ▼

OR Enter the start month [mm/yyyy]

and optionally the end month [mm/yyyy] of the period

salesforce.com Username

salesforce.com Password

salesforce.com Security Token

Run Script   Cancel

The script was last uploaded or changed on Oct 31, 2014 4:14 PM.

Figure 4: Adaptive Planning Import Data Sub-Tab (user entry) after clicking a Custom Script link (sample shown here).

Date	Type	File Name	Status	Action
11/30/2010 11:36:14	Actuals	FromWebService.txt	Complete	Show Details Delete History
11/18/2010 15:05:01	Actuals	FromWebService.txt	Complete	Show Details Delete History
11/18/2010 13:15:41	Actuals	FromWebService.txt	Complete	Show Details Delete History
11/2/2010 12:42:22	Actuals	FromWebService.txt	Complete	Show Details Delete History
11/2/2010 11:30:53	Actuals	FromWebService.txt	Complete	Show Details Delete History
11/2/2010 11:29:10	Actuals	FromWebService.txt	Complete	Show Details Delete History
10/27/2010 17:03:01	Actuals	FromWebService.txt	Complete	Show Details Delete History
10/27/2010 11:09:01	Actuals	FromWebService.txt	Complete	Show Details Delete History

Return to Import Page

Figure 5: Adaptive Planning Import History showing Connector imports.

The Connector Development Process

This is a high level overview of an Adaptive Connector development process. Additional and more detailed information will be provided at the project kickoff meeting.

The connector is installed on the Adaptive Planning server. There is no need to install or run anything on your network or behind your firewall. The connector runs on the server, communicating to the source system's API over the Internet (using a secure channel such as SSL), and then communicating internally to your Adaptive model using Adaptive Insight's API.

The connector is configured and installed by a Professional Services Integration Engineer. The Integration Engineer will work with you to determine your exact business requirements, and develop, install, test, and finally deploy the connector to your live model.

The information the Integration Engineer will need to know includes:

- Details on the API of the source system, whether Adaptive Planning has to develop a new or extend an existing hosted connector
- Credentials to access data on the source system, including any prerequisites that need to be configured on the source system to support extract calls from Adaptive Planning
- Details on the exact data to be extracted
- The destination of the import (e.g. GL Actuals, a cube sheet, etc.)
- Any other business rules, such as accounts to skip, signs to reverse, etc.

During development the Integration Engineer may send you files prepared for import for your review, to assure that the accounts are correct, the numbers are good, and business rules applied.

If your Adaptive Planning model is new or just going into production, you may wish to do your first import directly to your live system. If your Adaptive Planning model has been in production and you are now adding the connector, you may wish to first import to a test or clone model and tie out there, then switch to importing to your live model. This will be determined during the project.

An important activity in setting up the connector is completing your import account, import level, and dimension value mappings. This will be discussed early in the project. If you have been doing manual import then the mappings will most likely be completed, although the connector may bring in values that have not been seen before in manual imports and additional mapping will have to be done.

After you have reviewed and accepted the import to your live model the project will be complete.