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# Data Connect Guide

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# Get started with ThoughtSpot Data Connect

**Summary:** ThoughtSpot has partnered with Informatica to bring you ThoughtSpot Data Connect, which is a self-service data integration tool that allows you to easily pull data into ThoughtSpot for analysis.

You can import data to ThoughtSpot from on-premise and cloud based sources using ThoughtSpot Data Connect. The initial connection to your data sources is set up by ThoughtSpot. After the connections are set up, you can do all your data imports through the ThoughtSpot application.

ThoughtSpot Data Connect was developed by ThoughtSpot, but it uses Informatica's REST APIs to connect to multiple end points, define import tasks and execute them. You can use ThoughtSpot Data Connect to perform extract, transform, and load operations. Data source connections may be stored, to make reconnecting seamless.

After choosing a data source, you can choose from the list of available tables to import. Then select only the columns of interest from each table. Primary key and foreign key relationships will also be imported, but only when the primary key table is imported at the same time as the foreign key table. It's easy to apply transformations and filters to the data, too. So you only import the data you want to explore. You can schedule incremental or full recurring data loads. Everything you need to do to get your data loaded can be done within the ThoughtSpot application.

ThoughtSpot Data Connect is a premium feature, which is available at an additional cost. Please contact your ThoughtSpot representative, if you want to find out how to enable ThoughtSpot Data Connect.

## Where to go next

- [Before using ThoughtSpot Data Connect](#)  
There are a few prerequisites before using ThoughtSpot Data Connect. You need to have ThoughtSpot enable the connection to Informatica, and enter the data connection credentials.
- [Set up ThoughtSpot Data Connect](#)  
The ThoughtSpot team will assist you in the initial setup and configuration of ThoughtSpot Data Connect. You will need to provide the credentials for logging in to the various data sources you want to connect to.
- [Add a new data source](#)  
Now that you've enabled ThoughtSpot Data Connect, you will be able to add a new data source. Data sources are the source systems from which you want to import data and schedule repeat data loads.
- [Data sources management](#)  
After you have successfully loaded your tables, you can check on the status of the load, make edits, and more.

# Prerequisites and Architecture

There are a few prerequisites before using ThoughtSpot Data Connect. You need to have ThoughtSpot enable the connection to Informatica, and enter the data connection credentials.

## Prerequisites

The following prerequisites and considerations apply to the data connect feature:

- Your Informatica account will be provisioned by ThoughtSpot.
- If you want to use HTTPS with your URL, you will need to provide a signed certificate when enabling ThoughtSpot Data Connect.
- You will need outbound HTTPS (port 443 for infaagent) internet access to <https://app.informaticaondemand.com> and <https://app2.informaticacloud.com/>.

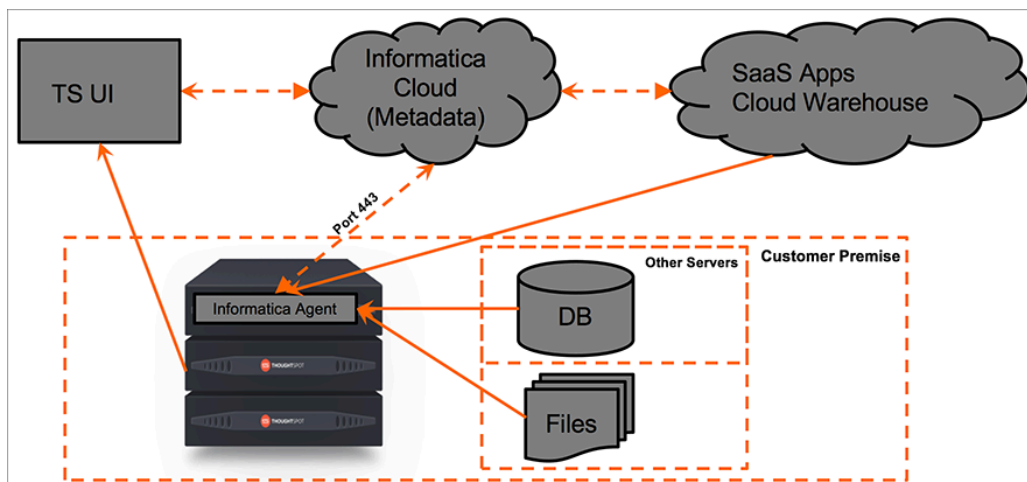
If outbound HTTPS internet access to <https://app.informaticaondemand.com> and <https://app2.informaticacloud.com/> is not possible, you can instead whitelist the Informatica Cloud IP address ranges [206.80.52.0/24](#) , [206.80.61.0/24](#) , [209.34.91.0/24](#) , and [209.34.80.0/24](#) .

- You will also need any other internet connectivity and credentials required to access any cloud data sources you want to connect to, such as Salesforce. No inbound access is required.
- Once ThoughtSpot Data Connect is enabled, any user who belongs to a group with **Has administration privileges** or who **Can Manage Data** can use the feature. Before enabling the feature, in sure that these privileges are configured properly.

Please refer to the [Informatica Cloud Security Architecture Overview](#) whitepaper to learn how each component and service is secured. You can also ask ThoughtSpot Support for a copy of the document.

## ThoughtSpot Data Connect design

ThoughtSpot Data Connect is designed to configure and connect to any on-premise or cloud data source. It quickly pulls data into ThoughtSpot through an easy to use point-and-click user interface. This diagram shows all of the required connections.



## Related information

[ThoughtSpot Egnyte site](#)

# Set up ThoughtSpot Data Connect

The ThoughtSpot team will assist you in the initial setup and configuration of ThoughtSpot Data Connect. You will need to provide the credentials for logging in to the various data sources you want to connect to.

Your purchase of ThoughtSpot Data Connect includes the necessary credentials for connecting to Informatica. ThoughtSpot Support will supply the Informatica credentials, if you do not already have an account. You can change the Informatica credentials later, if you would like. You need these credentials when issuing the command to enable ThoughtSpot Data Connect.

To set up ThoughtSpot Data Connect, first check with ThoughtSpot Support to ensure they have provisioned an account for you with the appropriate connectivity licenses. A full list of supported connectivity licenses is available in the [Data Connect connectors reference](#).

Enable ThoughtSpot Data Connect by completing the following steps:

1. Log in to the Linux shell using SSH.
2. Invoke `tscli` to enable ThoughtSpot Data Connect, which will register with Informatica Cloud and start the `infaagent` service.

The process will take a couple of minutes:

```
tscli etl enable-lw
--admin_username <admin_user>
--username <Informatica_user>
--thoughtspot_url <URL>
--org_id <informatica_org_id>
[--pin_to <IP_address>]
[--proxy_host <proxy_server_hostname>]
[--proxy_port <proxy_server_port>]
```

If you want to use HTTPS with your URL, you will need to use a signed certificate.

The parameter `org_id` specifies the Informatica id of the organization (company). `org_id` shouldn't include the prefix `Org`. For example, if on Informatica cloud, the `orgid` is `Org003XYZ`, then use only `003XYZ`.

The command `--pin_to` is optional. If you specify an IP to pin to, that node becomes sticky to the Informatica agent, and will always be used. This defaults to the public IP address of the localhost where this command was run.

The commands `--proxy_host <proxy_server_hostname>` and `--proxy_port`

``` are also optional, and specify the proxy details.

3. You may change your user password using the following `tscli` command:

```
`tscli etl change-password --admin_username <admin_use
r> --username <Informatica_user>`
```

Now, you can log in to ThoughtSpot, and begin using ThoughtSpot Data Connect.

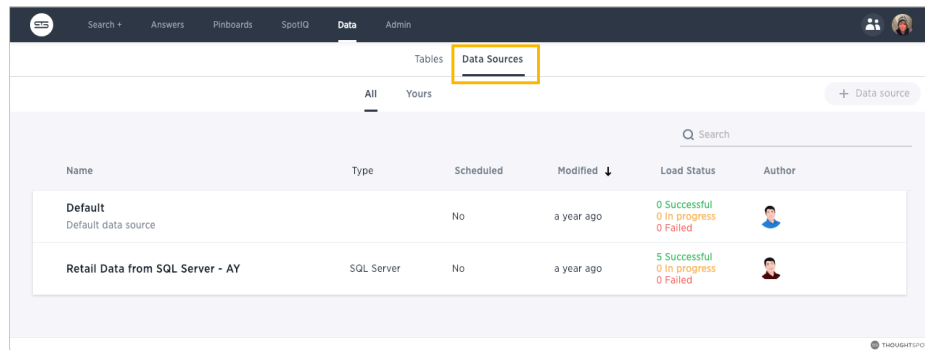


## Add a new data source

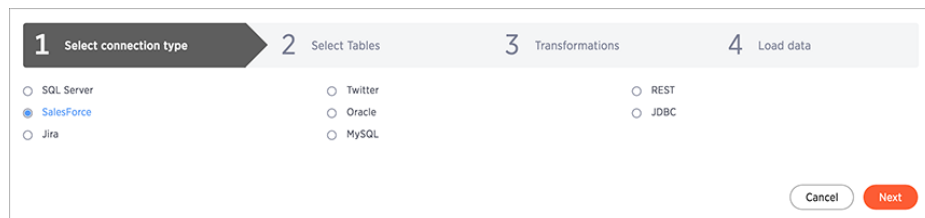
Now that you've enabled ThoughtSpot Data Connect, you will be able to add a new data source. Data sources are the source systems from which you want to import data and schedule repeat data loads.

Data sources can consist of relational database sources, like SQL Server, or applications, like Marketo or Salesforce. To add a data source:

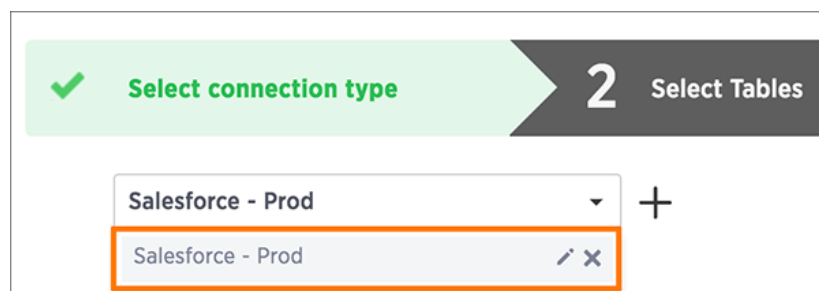
1. Log in to ThoughtSpot from a browser.
2. Click **Data**, on the top navigation bar.
3. Click the **Data Sources** tab at the top of the page, and select **+ New data source** on the upper right hand side of the panel.



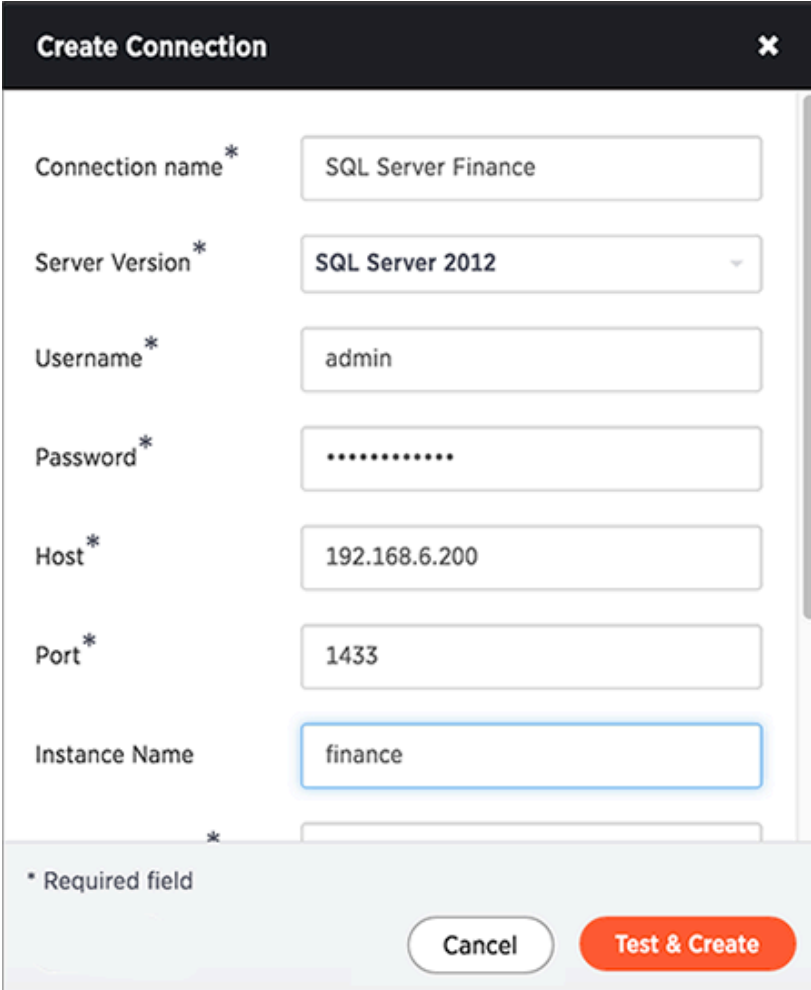
4. Select which type of connection you wish to use from the available list.
5. Select a connection type and click **Next**.



6. To select a connection, choose one of these options:
  - Select a pre-defined connection type, by choosing it from the **Select Connection** list:



- Click + to create the connection and provide the credentials to your data source. Then click **Test & Create**:

A screenshot of a 'Create Connection' dialog box. The dialog has a dark header with the title 'Create Connection' and a close button (X). Below the header, there are several input fields with labels and asterisks indicating they are required: 'Connection name\*' with the value 'SQL Server Finance', 'Server Version\*' with a dropdown menu showing 'SQL Server 2012', 'Username\*' with the value 'admin', 'Password\*' with masked characters '.....', 'Host\*' with the value '192.168.6.200', 'Port\*' with the value '1433', and 'Instance Name' with the value 'finance'. At the bottom left, there is a legend '\* Required field'. At the bottom right, there are two buttons: 'Cancel' and 'Test & Create' (which is highlighted in orange).

**Create Connection** ✕

Connection name\* SQL Server Finance

Server Version\* SQL Server 2012

Username\* admin

Password\* .....

Host\* 192.168.6.200

Port\* 1433

Instance Name finance

\* Required field

Cancel Test & Create

Refer to the [Data Connect connectors reference](#) for more information on each of the specific attributes you must enter into the dialog box.

- Choose the tables you wish to load from the list of **Available Tables**.

Only the first 200 objects that occur alphabetically are listed per schema. If you want to access a table that falls below the first 200 objects alphabetically, you must use the object search bar.

Here are examples of the user and system performed search patterns for this object search bar:

- User enters KNA, then the system performs a search for %KNA%.
- User enters KNA\*, then the system performs search for KNA%.
- User enters \*KNA, then the system performs search for %KNA.
- User enters "KNA", then the system performs exact match search for KNA. Select the specific columns to import.

Field names must contain 65 characters or less and only contain alphanumeric or underscore characters. Spaces in column names are not supported. In addition, names cannot start with a number.

If you have a table with columns that violate these limitations, you can work around the issue by:

- Creating a View, which contains appropriate field names, based on the source table .

- b. Then use Data Connect to pull data and write the View to ThoughtSpot.

✓ **Select connection type** **2 Select Tables**

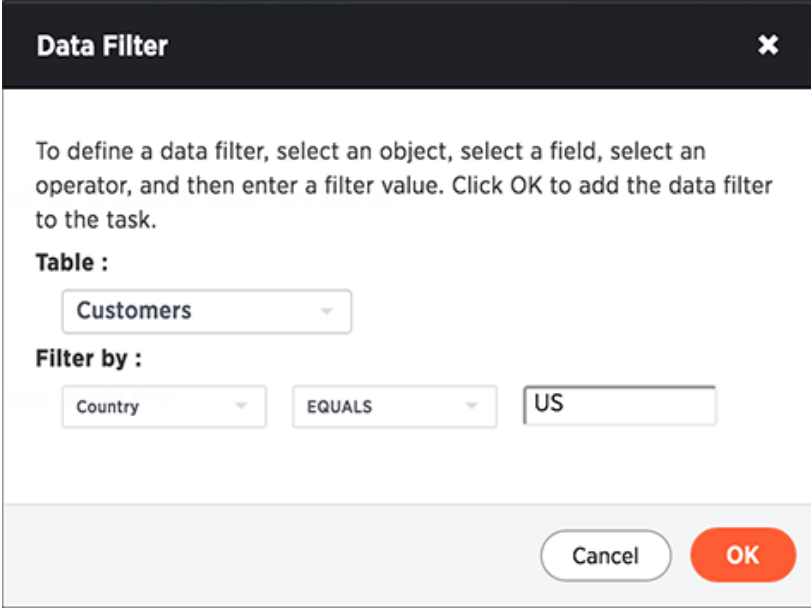
Salesforce - Prod ▼

**Available Tables**

search by name

|                                       |                       |
|---------------------------------------|-----------------------|
| ▶ <input type="checkbox"/>            | AcceptedEventRelation |
| ▶ <input type="checkbox"/>            | AccountCleanInfo      |
| ▶ <input type="checkbox"/>            | AccountContactRole    |
| ▼ <input checked="" type="checkbox"/> | AccountFeed           |
| <input checked="" type="checkbox"/>   | ParentId              |
| <input checked="" type="checkbox"/>   | LastModifiedDate      |
| <input checked="" type="checkbox"/>   | IsDeleted             |
| <input type="checkbox"/>              | ContentType           |

8. When all the columns are selected, click > to move them to the **Selected Tables** box. Click **Next**.
9. You can optionally apply a filter to only import specific rows by clicking **New...** under **Data Filters**.
- Select a table to filter.
  - Select a filter by specifying a column, operator, and value.



**Data Filter** [X]

To define a data filter, select an object, select a field, select an operator, and then enter a filter value. Click OK to add the data filter to the task.

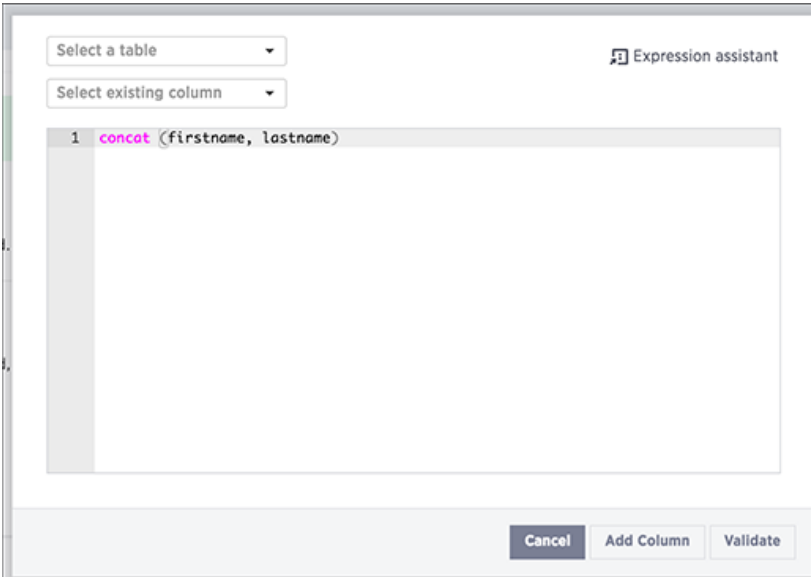
**Table :**

**Filter by :**

- c. Click OK.
  - d. You can create as many filters as you need by clicking + and repeating these steps.
10. You can optionally apply data transformations and write the result to a new column by clicking **New...** under **Expressions**.
- a. Give the new column an alphanumeric name (underscores are okay).

You can rename it later in the ThoughtSpot application.

- a. Select the table and column the data will come from.
- b. Type in an expression. You can see a list of expressions by clicking the **Expression assistant**.



Select a table

Select existing column

1 **concat** (firstname, lastname)

- c. Click **Add Column**.
  - d. Click **Validate** to validate your expression before creating the data source.
  - e. You can create as many expressions as you need by clicking + and repeating these steps.
11. Click **Next**.
  12. Provide a **Source Name** for the data source.
  13. Check the list of columns to be imported, to make sure it is correct.
- If you are loading into new or empty tables, or if you want to delete any data that already exists in the tables, click the checkbox to select **Truncate data in the existing tables**.
14. If you want to specify repeat data loads, create a loading schedule.

The screenshot shows the 'Load data' step of a data source configuration process. At the top, there are four progress indicators: 'Select connection type', 'Select Tables', 'Transformations', and '4 Load data'. The main area is titled 'Test data source' and contains two sections: 'Tables' and 'Set schedule'.

The 'Tables' section lists several tables: 'Categories', 'Customers', 'Orders', 'Products', and 'Region'. Below this list, there are two checkboxes: 'Truncate data in the existing tables.' (unchecked) and 'Enable email notifications for data load tasks' (checked).

The 'Set schedule' section includes a 'Starts' field set to '05/18/2016 at 08:00', a 'Repeats' dropdown set to 'Every N Minutes', and a 'Run the task every' section set to '10 minutes on:'. The days of the week are listed with checkboxes: Sunday (checked), Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (unchecked), and Saturday (unchecked).

Below the days, there are 'Repeat Options': 'Repeat Indefinitely' (unchecked) and 'Repeat until 09/29/2016 at 00:00' (checked). There is also a 'Disable schedule' checkbox (unchecked).

At the bottom, there are two sections: 'Add pre-script' and 'Add post-script'. At the very bottom, there are three buttons: 'Back', 'Cancel', and 'Import'.

15. If you want to receive an email notification letting you know when your data load completes, select **Enable email notifications for data load tasks**.

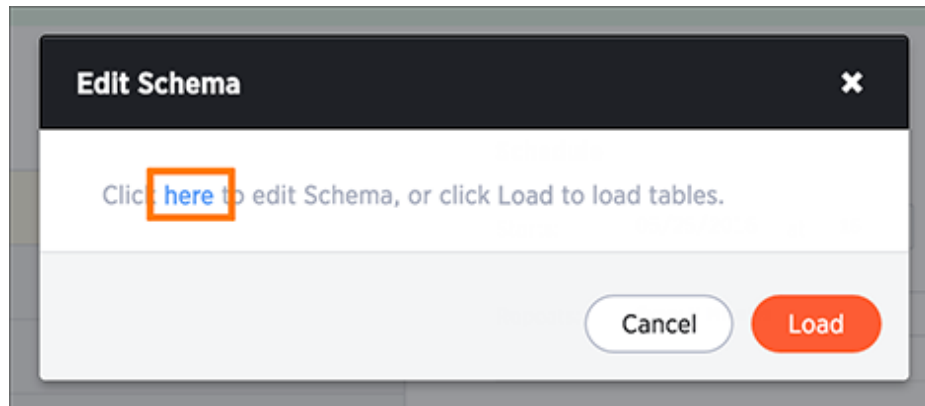
Email notifications are only sent to the respective email address of the user who created the data source. You can't send notifications to multiple email addresses.

To receive email notifications, you must enable **Email me sharing notifications** in your Profile Preferences. You also need to have an email set in your user properties found on the Admin User Management page.

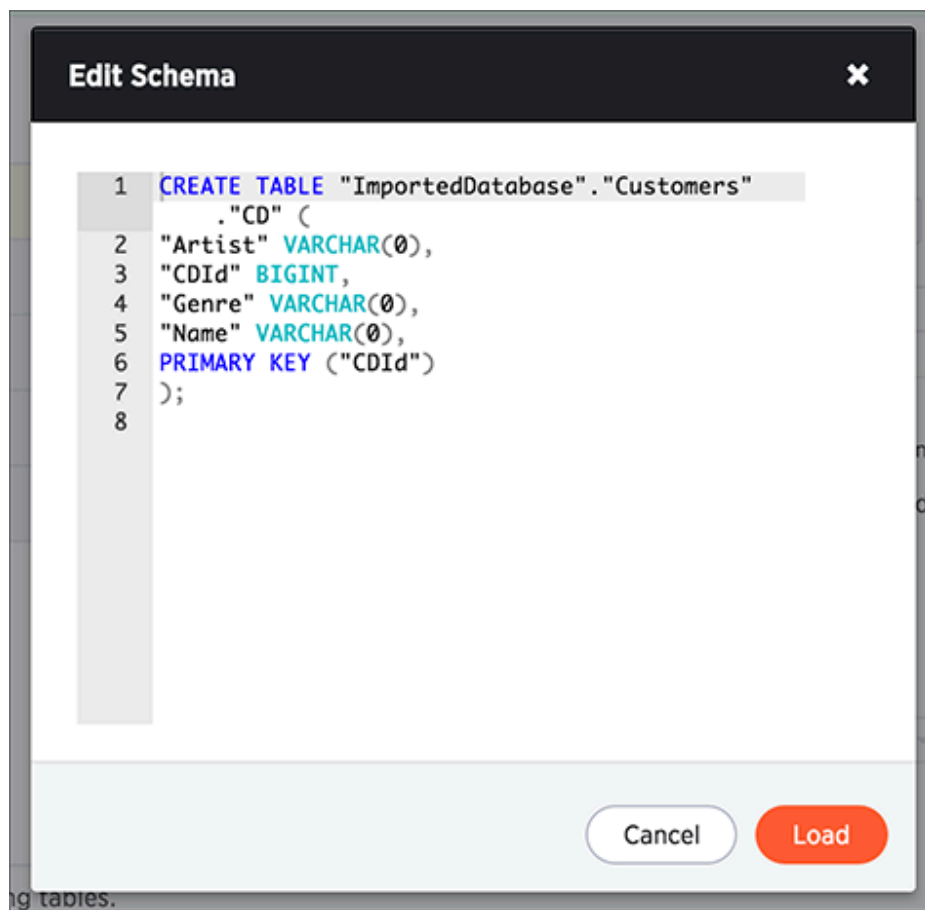
16. You can add a pre-script that will run your TQL script before the datasource uploads.

Additionally, you can add a post-script that will run your TQL script after the data uploads. This feature is not available if Informatica Cloud Services is still in use.

17. Click **Import**.
18. If you want to view or change the SQL DDL (data definition language) that will create the target table, click [here](#).



19. Review and edit the schema as necessary. Click **Load** to load the tables.



20. Click **Load**.

Your data source will appear on the Data Sources list page, and you can find the imported tables on the Tables list page. Tables imported via ThoughtSpot Data Connect display the job name in the Source column.

## About changing the schema (DDL)

You can view and edit the DDL script that gets generated by ThoughtSpot Data Connect. This allows you to review the table that will be created and make changes to the SQL that generates it. Some common changes you can make to the DDL before you first run the data load are:

- Edit the DDL script to point to an existing table in ThoughtSpot. The columns and their order must exactly match that of the existing table. You can check the columns and their order by issuing the `SCRIPT TABLE <table_name>` command from TQL. You may need to rearrange the order of columns in the generated DDL so that it matches the order of the target table.
- Create the table(s) in a different schema than what the default DDL suggests.
- Add sharding using the `PARTITION BY HASH (<number>) <column>` syntax.



# About incremental data loads

**Summary:** You can create an incremental data load, with some planning ahead.

Although there is no native incremental load capability, you can do incremental loads by adding a filter on the source data. Filters only work if the source has the capability of providing information on the last successful load. This means the source should have a timestamp field that indicates when a particular source was modified.

If your source data has such a timestamp, then you can use the following filters:

- `modifiedDate > $LastRunDate`
- `modifiedTime > $LastRunTime`

The `$LastRunDate` and `$LastRunTime` filters are correctly updated at runtime to reflect the date/time of the last successful job run. Both `$LastRunDate` and `$LastRunTime` are in GMT, they cannot be reconfigured.

**Note:** If you are loading data with datetime values and the values' timezones are anything other than GMT, the data is loaded at incorrect intervals. For this reason, ensure your timezone values are in GMT prior to loading them.

You can use filters on any other column of any datatype, if the filter provides a way to identify the modified rows. Even if the source does not have this capability, you may still be able to do an incremental load.

As long as a primary key exists on the target ThoughtSpot table, the data will be loaded using an `upsert`. This means that for a given row being loaded, if the primary key already exists in the target table, that row is updated with the data in the new row. If a row with that primary key does not exist, the new row will be inserted. This is how ThoughtSpot handles data loads into a table that already contains rows, and it is the equivalent to an incremental load.

If you are relying on the `upsert` method, you'll want to run a `COMPACT TABLE` command in ThoughtSpot SQL Command Line (TQL) to reduce the size of the table at intervals (usually weekly).

Another technique that can effectively free up space would be to run a post-job script that deletes data older than a particular date. This keeps the data fresh and ensures that old data, which may not be valuable, is not taking up memory.

# Data sources management

**Summary:** After you have successfully loaded your tables, you can check on the status of the load, make edits, and more.

You can manage your new data sources by clicking on the name of your source on the **Data Sources** page. You can have up to 50 scheduled jobs on your cluster at time. Contact ThoughtSpot Support if you'd like to increase this limit.

| Name                                    | Type       | Scheduled | Modified   | Load Status                               | Author |
|-----------------------------------------|------------|-----------|------------|-------------------------------------------|--------|
| <b>Default</b><br>Default data source   |            | No        | a year ago | 0 Successful<br>0 In progress<br>0 Failed |        |
| <b>Retail Data from SQL Server - AY</b> | SQL Server | No        | a year ago | 5 Successful<br>0 In progress<br>0 Failed |        |

Once you have selected a data source, you have the option to perform a number of editing and maintenance tasks.

## Schedule, edit, and refresh

You can select a table row and click one of the following three buttons to make changes:

- **Schedule:** Opens a Scheduler menu where you can make changes to the loading schedule.
- **Edit:** Takes you back to edit the data source details, such as loading another table or truncating an existing one.
- **Refresh:** Refreshes the data load status.

| NAME                                        | LOAD STATUS | MODIFIED       |
|---------------------------------------------|-------------|----------------|
| <input checked="" type="checkbox"/> Account | Success     | 13 minutes ago |



## Restart the load

Selecting a source and clicking the **Restart** icon will immediately reload the data.

A screenshot of a web application interface. At the top, there are three buttons: 'Schedule', 'Edit', and 'Refresh'. Below these, there is a search bar with the placeholder text 'search by name'. In the center, there are two buttons: 'Abort' and 'Restart'. The 'Restart' button is highlighted with a red rectangular box. Below the buttons, there is a table with three columns: 'NAME', 'LOAD STATUS', and 'MODIFIED'. The first row of the table has a checkbox, the text 'Account', a green checkmark followed by the word 'Success', and the text '6 minutes ago'.



[View log files](#)

You can download the session logs for a data load run. Select a table row, and click **View session logs** at the bottom of the page. View the log file to troubleshoot any failed loads or to simply check the log queries.

|                          |           |                                                                                           |                                                                                                  |
|--------------------------|-----------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | Suppliers |  Success | a minute ago  |
| 2 Items                  |           |                                                                                           |                                                                                                  |
|                          |           |                                                                                           |                                                                                                  |

## Delete a data source

You can delete a data source by selecting it in the **Data Sources** page, then clicking the **Delete** icon.

| Tables                              |                                                                                              |            | Data Sources |
|-------------------------------------|----------------------------------------------------------------------------------------------|------------|--------------|
| All                                 |                                                                                              |            | Yours        |
| <div>Delete</div>                   |                                                                                              |            |              |
|                                     | NAME                                                                                         | TYPE       | SCHEDULED    |
| <input type="checkbox"/>            |  Default  |            | No           |
| <input checked="" type="checkbox"/> |  Accounts | SalesForce | Yes          |

**Note:** Do not delete the Default data source. It does not correspond to any connection in ThoughtSpot Data Connect. However, this source is assigned to default datasets.

# About making changes to Data Connect setup

**Summary:** You can change to the scheduling, data sources, or even the schema.

After setting up ThoughtSpot Data Connect, you may want to make changes to the scheduling, data sources, or even the schema you are importing into in ThoughtSpot. These best practices describe how to make such changes.

## Changes to data sources

If your company migrates from one source database or application to another you may find that you need to redo the data import using the new system. You can do this without losing any data that has already been loaded into ThoughtSpot, but you need to be careful not to accidentally delete an existing table that was created by the old data source. Create the new data source, but choose to retain the table when you delete the old data source. You should also stop any scheduled jobs associated with the old data source before deletion.

- [Delete a connection](#)
- [Delete a data source](#)

## Changes to scheduled data imports

It's easy to change scheduled data imports to run at a different time or frequency through the Data Connect web interface. You may also want to pause a data import because the source system will be offline for maintenance. You can then resume it, when the maintenance has been completed.

- [Stop a scheduled job from running](#)

## Changes to the Schema in ThoughtSpot

It is very common to need to change what you're importing into ThoughtSpot for various reasons. For example the source database may have changed, because you've implemented a new application. Or you might simply change your mind about the best way to model the data that was brought in through Data Connect.

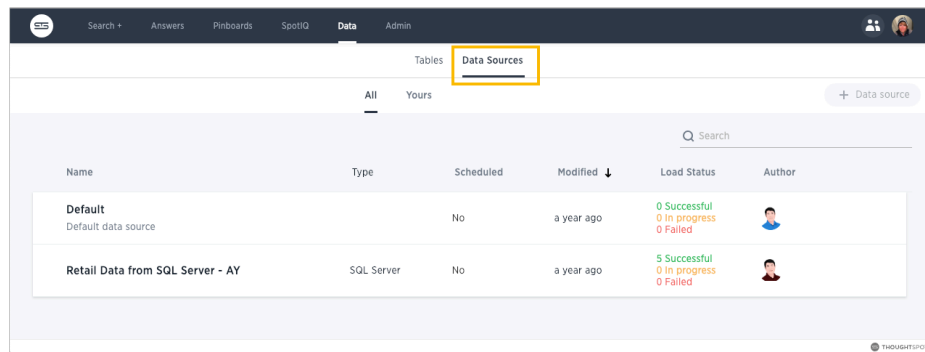
- [Change sharding for a data source](#)
- [Change a data type for a data source](#)
- [Add a column to an existing data source](#)
- [Remove a column from an existing data source](#)

# Edit a connection

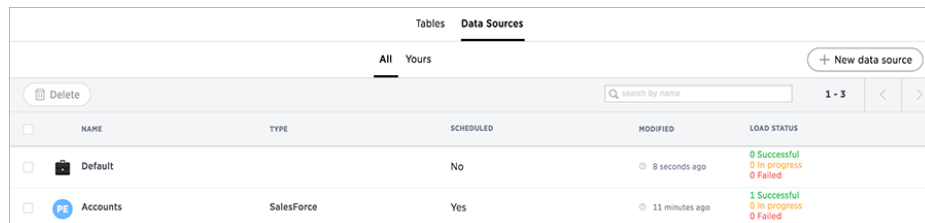
**Summary:** You can edit a connection used in a data source.

You can safely edit a connection when you create a new data source or edit an existing one. To edit a connection:

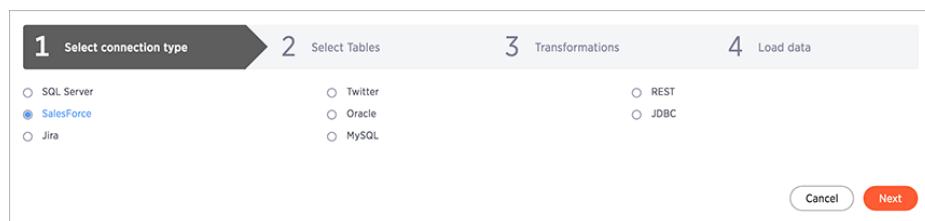
1. Log in to ThoughtSpot from a browser.
2. Click **Data** on the top navigation bar.
3. Click the **Data Sources** tab at the top of the screen.



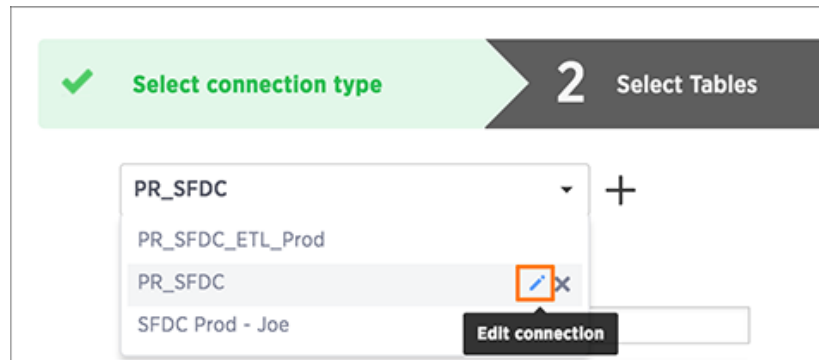
4. Select **+ New data source** on the upper right hand side of the panel.



5. Select the connection type of interest and click **Next**.



6. In the **Select Tables** step, click the **Select a connection** dropdown and browse the list for the connection you wish to edit.
  - a. Click **Edit connection** on the right of your selected connection to open the Edit connection dialog box.



7. Edit the connection details, then click **Test & Edit**.

The screenshot shows the 'Edit connection' dialog box. It has a title bar with 'Edit connection' and a close button (X). The dialog contains several fields:

- Connection name\*: PR\_SFDC
- Username\*: example@thoughtspot.com
- Password\*: (empty field)
- Security Token\*: (empty field)
- Service URL\*: https://test.salesforce.com/services/!

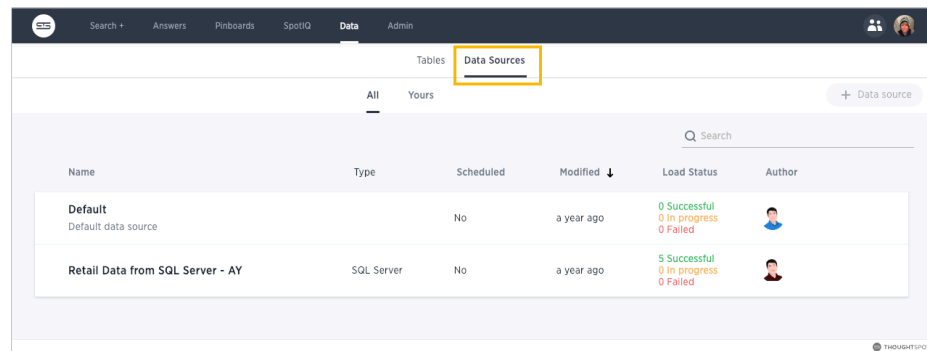
At the bottom, there is a legend: '\* Required field'. Below the legend are two buttons: 'Cancel' and 'Test & Edit'.

# Delete a connection

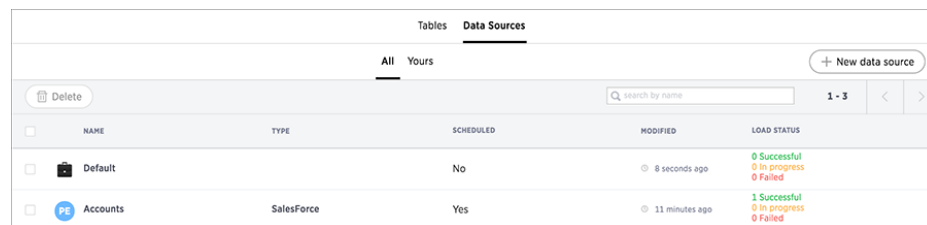
A connection is not tied to a task, and can therefore be called in multiple data sources. So in order to delete a connection, you must first delete all of the sources and tasks that use that connection. Once the connection is not used in any data source, you will be able to delete it.

To delete a connection:

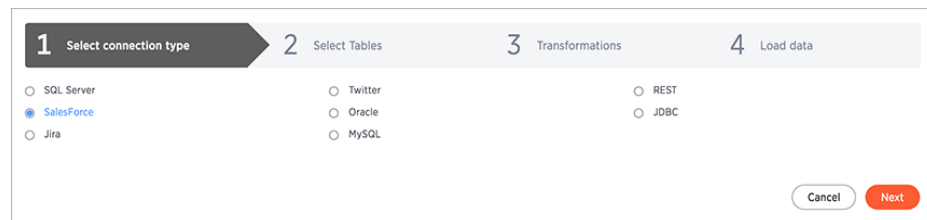
1. Log in to ThoughtSpot from a browser.
2. Click **Data**, on the top navigation bar.
3. Click the **Data Sources** tab at the top of the screen.



4. Delete any dependent data sources. To delete a data source, see [Delete a data source](#).
5. Select **+ New data source** on the upper right hand side of the panel.

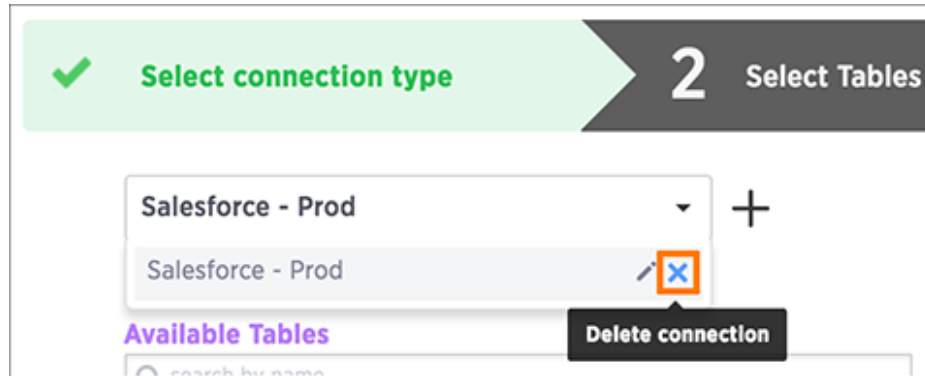


6. Select the connection type of interest and click **Next**.



7. In the **Select Tables** step, click the **Select a connection** dropdown and browse the list for the connection you wish to delete.

8. Click the x on the right of your selected connection to delete it.





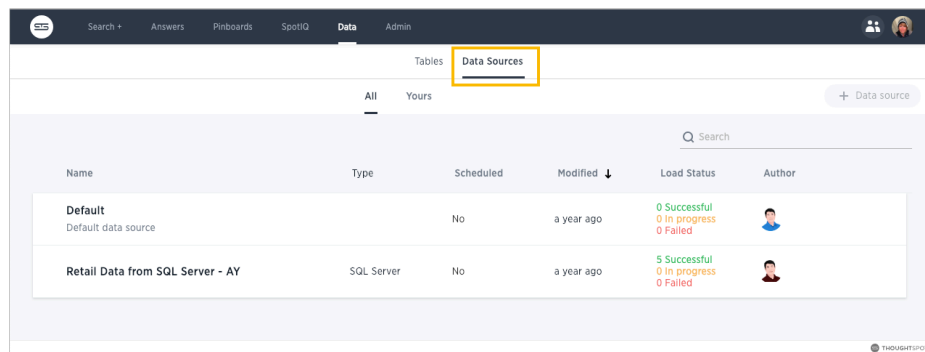
## Delete a data source

**Summary:** If you want to delete a data source, make sure and read this section so you don't inadvertently delete data in ThoughtSpot.

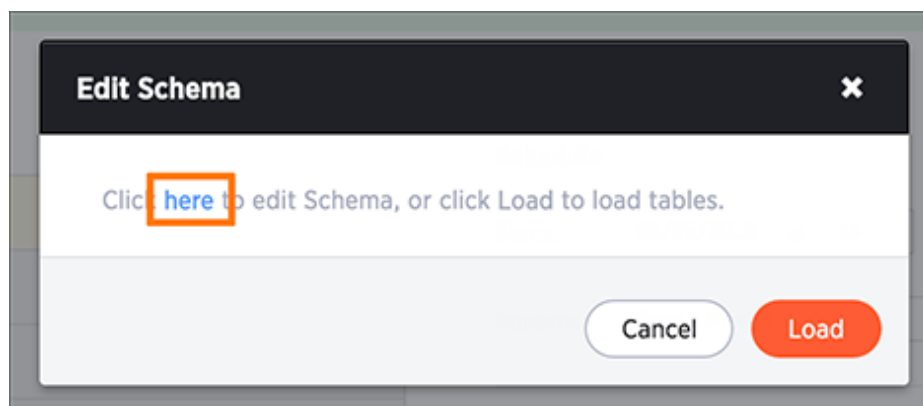
Whenever you delete a data source, you also have the option to drop or retain the table it loads into in the target system (ThoughtSpot). This is useful when you make changes to a table and create a new data source that loads into the table. So, you can safely delete any data source that references a target table that you don't want to lose.

Before you begin, if there are any recurring data load jobs for the data source you are deleting, follow the steps in [Stop a scheduled job from running](#). Then, do the following to delete a data source:

1. Log in to ThoughtSpot from a browser.
2. Click **Data**, on the top navigation bar.
3. Click the **Data Sources** tab at the top of the screen.



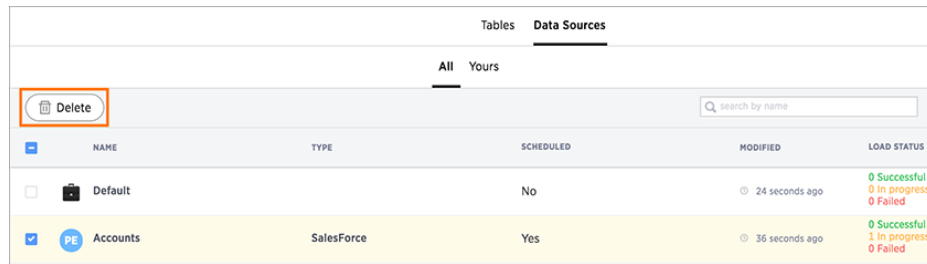
4. Find the data source you want to delete, and click on its name.
5. Click **Edit**. This will bring you to the setup screens for a new data source.  
Step through all the screens by clicking **Next**, until you reach the final page.
6. Click the **Import** button.
7. Click the [here](#) link to review the TQL script that created the target table in ThoughtSpot.



8. Take a look at the table name and its schema.

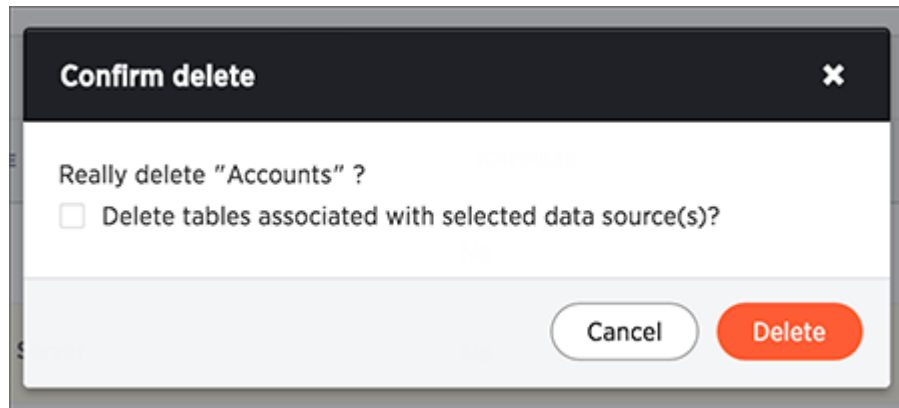
Decide if the table is one you want to keep in ThoughtSpot.

9. Go back to the data sources listing, click the checkbox next to the data source, and delete it.



|                                     |          | Tables         |           | Data Sources   |                                           |
|-------------------------------------|----------|----------------|-----------|----------------|-------------------------------------------|
|                                     |          | All            | Yours     |                |                                           |
|                                     |          | search by name |           |                |                                           |
|                                     | NAME     | TYPE           | SCHEDULED | MODIFIED       | LOAD STATUS                               |
| <input type="checkbox"/>            | Default  |                | No        | 24 seconds ago | 0 Successful<br>0 In progress<br>0 Failed |
| <input checked="" type="checkbox"/> | Accounts | SalesForce     | Yes       | 36 seconds ago | 0 Successful<br>1 In progress<br>0 Failed |

10. In the Confirm delete prompt, select the checkbox if you want to delete the tables associated with the data source. Leave the checkbox unselected if you have decided to keep the tables.



# Stop a scheduled job from running

**Summary:** You may want to stop a scheduled job from running for a time, or even permanently.

Use this procedure to pause or stop a job. There are a few conditions when it may be useful to stop or pause a scheduled job:

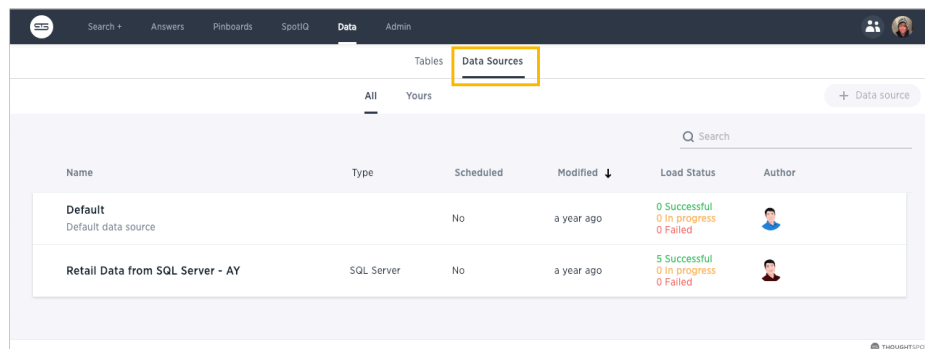
- The source system will be offline for maintenance.
- You are migrating the data to a new source system, and don't want to delete the original job.
- There is a problem with the job, and you don't want it to run while you are figuring out how to solve it.
- ThoughtSpot will be offline for scheduled maintenance or an upgrade.
- You want to delete the data source on which the scheduled job runs.

To stop a scheduled job from running:

1. Log in to ThoughtSpot from a browser.
2. Click on **DATA**, on the top navigation bar.



3. Click the **Data Sources** tab at the top of the screen.



4. Click on the data source for the scheduled job you want to pause.
5. Click **Schedule** to edit the schedule.
6. Stop the job by selecting **Disable schedule**.

**Scheduler** [X]

Starts: mm/dd/yyyy at 00 : 00

Repeats: Select an Option

☒ Disable schedule

Cancel Ok

7. Click OK.

## Change sharding for a data source

Use this procedure to change the sharding on a data source after it has been set up and the load has run. You can still change the number of shards or make it a replicated table instead.

You should always take a snapshot of your database before making any schema changes. This will allow you to revert back to the prior state if you make an error, or something doesn't work as you expected after the schema change.

After you've set up a Data Source, you may decide that you want the table it is loading into to have a different type of sharding. For example, if you specified 96 shards, but then you expand your cluster, you may want to specify a large number of shards. You can even change a sharded table to a replicated table, or vice versa, by using this procedure.

First, you'll modify the table sharding, using TQL. Note that this operation changes the target table itself. You do not need to change the DDL that was generated when you first configured the data source. That DDL executes only one time, to build the empty table into which the data gets loaded. So if you change the sharding on the table in ThoughtSpot, you do not need to change the DDL that got generated when you first set up the data source. Likewise, if the load is scheduled to recur, the sharding that is defined on the target table will be used in the next load. Sharding is a one time setup, and does not need to be kept in sync with the data source DDL.

To change the sharding on a Data Source:

1. Log in to the Linux shell using SSH.
2. Launch TQL.

```
$ tql
```

3. Designate the database you'll be working in:

```
TQL> use <database_name>;
```

4. Find the name of the table you want to change. You can use the TQL command `SHOW TABLES;` to see a list of tables.

To see the current sharding on the table, use `SCRIPT TABLE <table_name>;`

5. Issue the command to change the sharding using this syntax:

```
TQL> ALTER TABLE <table>
      [SET DIMENSION | SET FACT
      [PARTITION BY HASH
      [(<shards>)]
      [KEY(<column>)]]]
```

For example:

- To make a sharded table into a dimension table (replicated on every node), use:

```
ALTER TABLE "products"  
SET DIMENSION;
```

- To make a dimension table into a sharded (fact) table or change the number of shards, use:

```
ALTER TABLE "sales"  
SET FACT PARTITION BY HASH (96)  
KEY ("productID");
```

6. The next time the data source load runs, it will use the new sharding automatically.

## Change a column data type

When a data type used in a data source has changed, or you decide that the data should come into ThoughtSpot with a different data type, you can change the data type, even if you've already loaded data into the target table.

You should always take a snapshot of your database before making any schema changes. This will allow you to revert back to the prior state if you make an error, or something doesn't work as you expected after the schema change.

When changing a data type in an existing table, be aware that answers and pinboards created on top of that table (or worksheets that include it) may change. This is because charts and aggregations depend upon the data type. So for example changing from INTEGER to VARCHAR could break charts that used the numeric data type INTEGER to calculate an average or a total. Because of this, use caution, and check all dependent objects before and after changing the data type, to ensure that they display as intended.

The procedure to make this change to an existing data source has two main parts:

- Alter the table definition in the target table using TQL.
- Create a new data source, and edit the DDL to match the target table exactly.

To change the data type of an existing data source:

1. Log in to the Linux shell using SSH.
2. Launch TQL.

```
$ tql
```

3. Designate the database you'll be working in:

```
TQL> use <database_name>;
```

4. Find the name of the table you want to change. You can use the TQL command `SHOW TABLES;` to see a list of tables.

To see the current sharding on the table, use `SCRIPT TABLE <table_name>;`

5. Issue the command to change the data type of a column using this syntax:

```
TQL> ALTER TABLE <schema>.<table>  
      MODIFY COLUMN <column> <new_data_type>;
```

For example, to change "account\_id" with data type INT to data type VARCHAR:

```
TQL> ALTER TABLE foodmart.account  
      MODIFY COLUMN account_id VARCHAR(10);
```

You must use the fully qualified name of the old table when adding the column via TQL. To find that you can look at the DDL for the data source job itself.

6. Run the `SCRIPT TABLE` command to get the new DDL to create the table.

```
TQL> SCRIPT TABLE <table>;
```

Copy the output of the command. This includes the fully qualified table name of the ThoughtSpot table and the column names of the source columns. Replace any `VARCHAR(<number>)` column definitions with `VARCHAR(0)`, to match the DDL that Data Connect generates. This is the DDL that you will use in your new data source.

7. [Create a new data source](#). Be sure to choose the correct columns to match the new target table columns definitions. When you reach the step about editing the generated schema DDL, paste in the DDL that was output by the `SCRIPT TABLE` command.
8. Run the data load and verify that everything is working as it should be.
9. If the old data source was running as a recurring load, [stop it from running](#).



# Add a column to an existing data source

**Summary:** Add a column to an existing data source.

You can add a column to an existing data source using this procedure. This will work even if the data load has already been run in the past.

You should always take a snapshot of your database before making any schema changes. This will allow you to revert back to the prior state if you make an error, or something doesn't work as you expected after the schema change.

Reasons you may want to add a column to an existing data source might include:

- A new column has been added to the source table, and you want to include it in the data import.
- You've decided to include an additional column from the source.

Initial DDL did not include a column, but you wanted to pull it in later in a subsequent load. Or it could be a new column added to the source.

The procedure to make this change to an existing data source has two main parts:

- Alter the table definition in the target table using TQL.
- Create a new data source, and edit the DDL to match the target table exactly.

1. Log in to the Linux shell using SSH.
2. Launch TQL.

```
$ tql
```

3. Designate the database you'll be working in:

```
TQL> use <database_name>;
```

4. Find the name of the table you want to change. You can use the TQL command **SHOW TABLES;** to see a list of tables.

To see the current sharding on the table, use **SCRIPT TABLE <table\_name>;**

5. Issue the command to change the data type of a column using this syntax:

```
TQL> ALTER TABLE <schema>.<table>  
      MODIFY COLUMN <column> <new_data_type>;
```

For example, to change "account\_id" with data type INT to data type VARCHAR:

```
TQL> ALTER TABLE foodmart.account  
      ADD COLUMN account_id VARCHAR(10)  
      DEFAULT '';
```

You must use the fully qualified name of the old table when adding the column via TQL. To find that you can look at the DDL for the data source job itself.

6. Run the `SCRIPT TABLE` command to get the new DDL to create the table.

```
TQL> SCRIPT TABLE <table>;
```

Copy the output of the command. This includes the fully qualified table name of the ThoughtSpot table and the column names of the source columns. Replace any `VARCHAR(<number>)` column definitions with `VARCHAR(0)`, to match the DDL that Data Connect generates. This is the DDL that you will use in your new data source.

7. [Create a new data source](#). Be sure to choose the correct columns to match the new target table columns definitions. When you reach the step about editing the generated schema DDL, paste in the DDL that was output by the `SCRIPT TABLE` command.
8. Run the data load and verify that everything is working as it should be.
9. If the old data source was running as a recurring load, [stop it from running](#).

# Remove a column from an existing data source

You can remove a column from a data source, even if its data load has been run in the past, by using this procedure. The procedure to make this change to an existing data source has two main parts:

- Alter the table definition in the target table using TQL.
- Create a new data source, and edit the DDL to match the target table exactly.

You should always take a snapshot of your database before making any schema changes. This will allow you to revert back to the prior state if you make an error, or something doesn't work as you expected after the schema change.

1. Log in to the Linux shell using SSH.
2. Launch TQL.

```
$ tql
```

3. Designate the database you'll be working in:

```
TQL> use <database_name>;
```

4. Find the name of the table you want to change. You can use the TQL command `SHOW TABLES;` to see a list of tables.

To see the current sharding on the table, use `SCRIPT TABLE <table_name>;`

5. Issue the command to remove the column from the table using this syntax:

```
TQL> ALTER TABLE <schema>.<table>  
      DROP COLUMN <column>;
```

For example, to drop the column "account\_id" from the table "account" in the schema "foodmart":

```
TQL> ALTER TABLE foodmart.account  
      DROP COLUMN account_id;
```

You must use the fully qualified name of the old table when adding the column via TQL. To find that you can look at the DDL for the data source job itself.

6. Run the `SCRIPT TABLE` command to get the new DDL to create the table.

```
TQL> SCRIPT TABLE <table>;
```

Copy the output of the command. This includes the fully qualified table name of the ThoughtSpot table and the column names of the source columns. Replace any `VARCHAR(<number>)` column definitions with `VARCHAR(0)`, to match the DDL that Data Connect generates. This is the DDL that you will use in your new data source.

7. [Create a new data source..](#) Be sure to choose the correct columns to match the new target table columns definitions. When you reach the step about editing the generated schema DDL, paste in the DDL that was output by the `SCRIPT TABLE` command.
8. Run the data load and verify that everything is working as it should be.
9. If the old data source was running as a recurring load, [stop it from running](#).

## Add/remove columns in a loaded table

You can modify tables that have been selected for load in Data Connect by adding or removing columns.

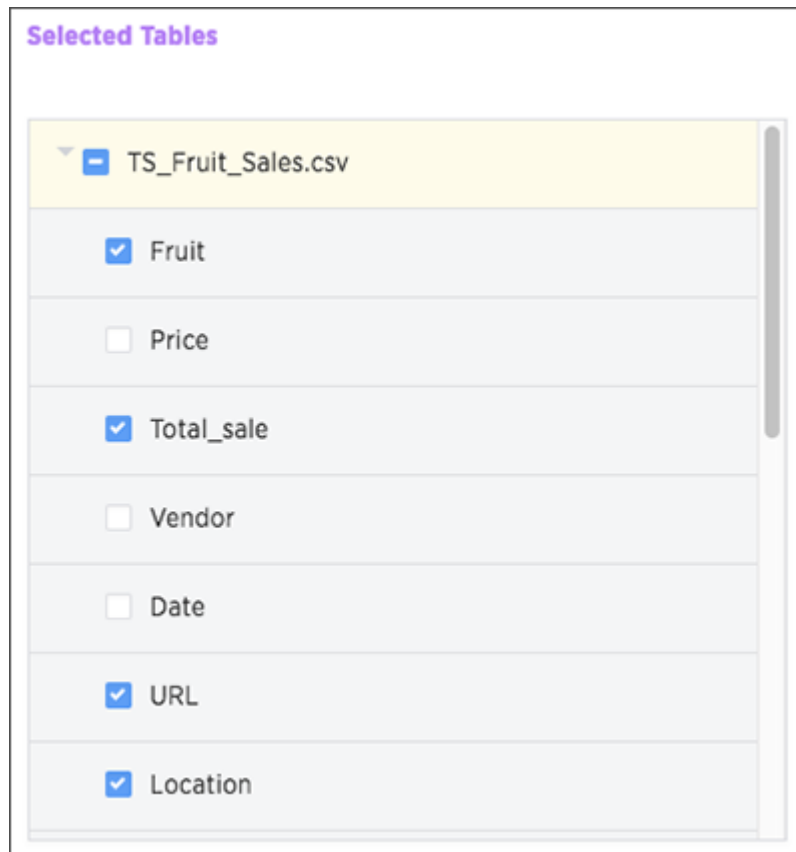
In addition to adding more tables while editing a data source, you can also add or remove columns from loaded tables. This makes it easier to include new source columns with your job, edit the data source definition to add or remove columns, and adapt existing jobs to change source schemas.

All relationships are captured with this feature. The relationships are automatically created for you when you add a primary key column.

It is recommended that you do not edit the schema when altering tables.

To add/remove columns in a loaded table:

1. While viewing the **Selected Tables** section of the **Select Tables** step, expand one or more tables.



2. Click the checkboxes to select/deselect tables columns for import.

You cannot deselect all columns and tables in the job.

3. Click **Next** and complete the import.

# Login credentials for administration

**Summary:** You need administrative access to perform the actions discussed in this guide.

You can access ThoughtSpot via SSH at the command prompt and from a Web browser.

## Administrative access

Each ThoughtSpot appliance comes pre-built with three default users. You should talk with a ThoughtSpot Customer Success Engineer or ThoughtSpot support, to get the password for each user. The default users are:

| Type             | Username                 | Description                                                                                                                                                                                                                                                                         |
|------------------|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Shell user       | <code>admin</code>       | Used for work that requires sudo or root privileges. Does not exist for application login. Logs for this user are found in <code>/usr/local/scaligent/logs</code> logs                                                                                                              |
| Shell user       | <code>thoughtspot</code> | Used for command line work that does not require sudo or root privileges. For example, these users can use <code>tsload</code> , <code>tql</code> , and check the cluster status. This user cannot login to the application. Logs for this user are found under <code>/tmp</code> . |
| Application user | <code>tsadmin</code>     | Access through a Web browser.                                                                                                                                                                                                                                                       |

Both the `admin` and `thoughtspot` user can SSH into the appliance. Once on the appliance, either user can do any of the following:

- `tscli`
- `tsload`
- `tql`

The `thoughtspot` user is restricted to `tscli` commands that do not require `sudo` or root privileges.

## SSH to the appliance

To perform basic administration such as checking network connectivity, starting and stopping services, and setting up email, log in remotely as the Linux administrator user “admin”. To log in with SSH from any machine, you can use the command shell or a utility like Putty.

In the following procedure, replace `<hostname_or_IP>` with the hostname or IP address of a node in ThoughtSpot. The default SSH port (22) will be used.

1. Log in to a client machine and open a command prompt.
2. Issue the SSH command, specifying the IP address or hostname of the ThoughtSpot instance:

```
ssh admin@<hostname_or_IP>
```

3. Enter the password for the admin user.

## Log in to the ThoughtSpot application

To set up and explore your data, access the ThoughtSpot application from a standard Web browser using a username and password.

Before accessing ThoughtSpot, you need:

- The Web address (IP address or server name) for ThoughtSpot.
- A network connection.
- A Web browser.
- A username and password for ThoughtSpot.

Supported Web browsers include:

| Browser           | Version      | Operating System                   |
|-------------------|--------------|------------------------------------|
| Google Chrome     | 20 and above | Windows 7 or greater, Linux, MacOS |
| Mozilla Firefox   | 14 and above | Windows 7 or greater, Linux, MacOS |
| Internet Explorer | 11           | Windows 7 or greater               |

✓ **Tip:** While Internet Explorer is supported, using it is not recommended. Depending on your environment, you can experience performance or UI issues when using IE.

To log in to ThoughtSpot from a browser:

1. Open the browser and type in the Web address for ThoughtSpot:  
`http://<hostname_or_IP>`
2. Enter your username and password and click **Enter Now**.

# Data Connect best practices

This section includes some tips and best practices for using ThoughtSpot Data Connect.

## Data sources

Unless you're trying to bring in relationships between tables with a data source, the recommendation is to create one data source load job per table. Doing this makes your data sources more flexible for if/when you need to change something (add a column, etc.)

If you want to add a foreign key, do it using the TQL command ALTER TABLE, after the load has completed. This is often easier than trying to get relationships to come in with a data load, and it works even if the relationship you want to create does not exist in the source system. If use this method, you'll need to manually create the relationships using a TQL script, which you can run afterward the first data load.

### Derived column names

When you create a derived column, further activities in ThoughtSpot Data Connect will show you the target column name, since there is no analogous column in the source.

### Compact tables to save memory

If you're doing incremental loads into existing tables, you may want to automate a script that runs the TQL command COMPACT TABLE either after each incremental load, or periodically (like weekly, for a nightly load). This is because when upserts are performed, space from the old rows is not released. The delta between each row that gets upserted is retained and takes up memory.

### Renaming columns and tables

ThoughtSpot does not support renaming columns using TQL for tables that were imported with Data Connect. If a column or table name changes on the source, you will need to recreate the data load job.

In older versions of ThoughtSpot Data Connect, you could not use characters other than alphanumeric and underscores. Now, you can change a column name to use those, for example you could change "percent\_gross\_margin" to "% gross margin".

**Remember:** The use of spaces is not supported. Also, field names must contain 65 characters or less, and they cannot start with a number.

## Status reporting

You can see the status of a data load job by looking at the list of data sources. The data load status gets updated every 30 seconds.



| Tables <b>Data Sources</b>               |          |            |           |               |                                           |
|------------------------------------------|----------|------------|-----------|---------------|-------------------------------------------|
| All Yours <span>+ New data source</span> |          |            |           |               |                                           |
| Delete <span>search by name</span> 1 - 3 |          |            |           |               |                                           |
| <input type="checkbox"/>                 | NAME     | TYPE       | SCHEDULED | MODIFIED      | LOAD STATUS                               |
| <input type="checkbox"/>                 | Default  |            | No        | 3 minutes ago | 0 Successful<br>0 In progress<br>0 Failed |
| <input type="checkbox"/>                 | Accounts | SalesForce | Yes       | 3 minutes ago | 0 Successful<br>1 In progress<br>0 Failed |
| <input type="checkbox"/>                 | x        |            | No        | 1 year ago    | 0 Successful<br>0 In progress<br>0 Failed |

To see loading details for each table that makes up a data load, click on the name of the data load.

| > <span>Schedule</span> <span>Edit</span> <span>Refresh</span>          |         |                                   |
|-------------------------------------------------------------------------|---------|-----------------------------------|
| <span>✕ Abort</span> <span>↺ Restart</span> <span>search by name</span> |         |                                   |
| <input type="checkbox"/>                                                | NAME    | LOAD STATUS <span>MODIFIED</span> |
| <input type="checkbox"/>                                                | Account | Success 4 minutes ago             |

## View log files

You can download the session logs for a data load run. Access the link to download the log on the data load status details page for the session. Check the log files for a successful or failed run, and fix the cause of the failure before resubmitting the job.

| > <span>Schedule</span> <span>Edit</span> <span>Refresh</span>                                                                                                                                                                                         |             |                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------------------------|
| <span>↺</span> <span>✕</span> <span>Search by name</span>                                                                                                                                                                                              |             |                                    |
| <input type="checkbox"/>                                                                                                                                                                                                                               | NAME        | LOAD STATUS <span>LAST LOAD</span> |
| <input checked="" type="checkbox"/>                                                                                                                                                                                                                    | Opportunity | Failed 1 day ago                   |
| <input type="checkbox"/>                                                                                                                                                                                                                               | User        | Success 1 day ago                  |
| <input type="checkbox"/>                                                                                                                                                                                                                               | Account     | Success 1 day ago                  |
| 3 Items                                                                                                                                                                                                                                                |             |                                    |
| <b>Opportunity</b><br>Loading status for the item is: [ERROR] Error occurred while writing data to the target native system : [java.lang.ClassCastException: java.lang.String cannot be cast to java.lang.Number]<br><a href="#">View session logs</a> |             |                                    |

## Timestamp format

All relevant source values should be in the following format: `yyyy-mm-dd hh:mm:ss`. In addition, please ensure that year values are within the range of 0000-9999. Any fractional seconds in the source values should be removed and converted to the format above by adding a transformation.

## Import relationships

Relationships (primary key/foreign key) can be imported from the source database. For this to work, the primary and foreign key(s) need to be made up of only one column each. That is, they cannot be composite keys. You will also need to include all the tables whose relationships you want to bring over into ThoughtSpot within a single data source.

## Edit the DDL script to choose a different database, schema, or table

You can edit the SQL DDL (data definition language) script generated by ThoughtSpot Data Connect to point to an existing table in ThoughtSpot. You can then load to that table and/or create the table in a different database/schema than what the default DDL suggests. To do this, the column names and the order of the column names must match exactly with the table you are importing into in ThoughtSpot.

## No need to import a column mentioned in an expression

It is not necessary to import a column that is mentioned in an expression. For example, let's say you have a source table "sales\_fact" with a column "revenue". You may want to use that column as part of an expression that calculates gross margin. But maybe you don't want to include the column "revenue" in the target table. You can unselect the column "revenue" in the table selection page, and then add your gross margin expression that references the column "revenue", even though it isn't part of the data to be loaded. Your expression will still work.

## Internet connectivity

The only internet access the needed for ThoughtSpot Data Connect to operate is outbound access to <https://app.informaticaondemand.com> and <https://app2.informaticacloud.com> (port 443). Of course, it also needs any other internet connectivity required to access any cloud data sources, like Salesforce. No inbound access is needed.

## Troubleshooting

To view details about error conditions, you can look at the trace file that is generated when there is a red bar error.

Possible issues that can occur are:

- Cannot connect to data source.
- Authentication was rejected.
- Schema being loaded does not match schema receiving the load.

## Expressions

You can validate your expressions when using ThoughtSpot Data Connect. Make sure to click **Validate** after entering your expression. This prevents you from entering an invalid expression that will fail at runtime.

When using the expression builder `concat` , you need to use single quotes instead of double quotes around each of the strings.

## Connection parameters

Informatica provides [documentation on each of its connectors](#). This contains information on the connection properties and what they mean for each connector. You can see the connection properties in ThoughtSpot Data Connect by mousing over the key value pairs, however, you won't be able to see their meanings. For that, you should refer to the Informatica documentation.

# Connectors reference

Here is a list of all of the source connectors, and their connection credentials, that are supported in ThoughtSpot Data Connect. As you create a new connection, you will need specific connection information to enter into the create connection dialog box. You can find more detailed information below for each of the connection types ThoughtSpot Data Connect supports.

## Amazon S3

- Connection name: Required. Enter a new Amazon S3 connection name.
- Access Key: Enter the access key ID used to access the Amazon account resources. This is required if you do not use AWS Identity and Access Management (IAM) authentication.
- Secret Key: Enter the secret access key used to access the Amazon account resources. This value is associated with the access key and uniquely identifies the account. You must specify this value if you specify the access key ID.
- Folder Path: Required. Enter the complete path to the Amazon S3 objects. You must include the bucket name and any folder name. For example, `<bucket name>/<my folder name>`.
- Master Symmetric Key: Provide a 256-bit AES encryption key in the Base64 format when you enable client-side encryption. You can generate a key using a third-party tool.
- Code Page: Required. Choose either MS\_1252 or UTF\_8 from the dropdown menu. The code page should be compatible with the Amazon S3 source.
- Region Name: Required. Make a selection from the dropdown menu, which includes US East (N. Virginia), US West (N. California), and US West (Oregon). This is where the Amazon S3 bucket is available.

## Hive (Hadoop)

- Connection name: Required. Enter a new Hadoop connection name.
- Username: Required. Enter the username of the schema of the Hadoop component.
- Password: Required. Enter the password of the schema of the Hadoop component.
- JDBC Connection URL: Enter the JDBC URL to connect to the Hadoop component.
- Driver: Enter the JDBC driver class to connect to the Hadoop component.
- Commit Interval: Enter the batch size, in rows, to load data to Hive.
- Hadoop Installation Path: Enter the installation path of the Hadoop component.
- HDFS Installation Path: Enter the HDFS installation path.
- HBase Installation Path: Enter the HBase installation path.
- Implala Installation Path: Enter the Implala installation path.
- Miscellaneous Library Path: Enter the library that communicates with Hadoop.
- Enable Logging: Choose whether to enable logging to enable the log messages.

## JDBC

- Connection name: Required. Enter a new JDBC connection name.
- JDBC Connection URL: Required. Enter the URL schema for the database. Use the corresponding schema for the following databases:
  - Microsoft SQL Server. `jdbc:sqlserver://<Host>\<Instance>:<Port>;databaseName=<Database>`
  - MySQL. `jdbc:mysql://<Host>:<Port>/<Database>`
  - Oracle. `jdbc:oracle:thin:@//<Host>:<Port>/<Service>`

- PostgreSQL. `jdbc:postgresql://<Host>:<Port>/<Database>`
- JDBC Jar Directory: Enter the path to the JDBC driver jar file. For example, you can enter the following directory: `C: /jdbc` . When you do not specify a directory path, the Secure Agent obtains the jar file from the directory that is specified in the `CLASSPATH` system variable.
- JDBC Driver Class Name: Enter the JDBC driver class name if you are using a JDBC driver without auto class load feature. If you do not specify this property, the Secure Agent loads the driver class name from the JDBC jar file.
- Schema: Enter the schema name, which varies by database. Use the following guidelines for the schema name:
  - Microsoft SQL Server. Use the schema name to specify the correct object.
  - MySQL. The schema name is the database name.
  - Oracle. The schema name is the user name.
  - PostgreSQL. Use the schema name to specify the correct object. You must enter a schema name to fetch metadata if the JDBC connection URL does not provide enough context.
- Username: Required. Enter the JDBC account username.
- Password: Required. Enter the JDBC account password.

## Jira

- Connection name: Required. Enter a new JIRA connection name.
- Username: Required. Enter the JIRA account username.
- Password: Required. Enter the JIRA account password.
- URL: Required. Enter the base JIRA URL of the JIRA instance you want to connect to. For example, `https://<your_company_name>.atlassian.net/` .

## MySQL

- Connection name: Required. Enter a new MySQL connection name.
- Username: Required. Enter the MySQL account username.
- Password: Required. Enter the MySQL account password.
- Host: Required. Enter the host number. For example, `192.156.3.123` .
- Port: Required. Enter the port number. For example, `3305` .
- Database Name: Required. Enter the database name you want to connect to.
- Code Page: Required. Choose either `MS_1252` or `UTF_8` from the dropdown menu. The code page should be compatible with the MySQL source.

## ODBC

- Connection name: Required. Enter a new ODBC connection name.
- Username: Required. Enter the ODBC account username.
- Password: Required. Enter the ODBC account password.
- Data Source Name: Required. Enter the system DSN.
- Schema: Enter the schema used for the source or target.
- Code Page: Required. Choose the code page type from the dropdown menu. This is the code page of the database server.
- odbcSubtype: Choose the odbcSubtype from the dropdown menu. This categorizes the type of the connection so that pushdown optimization support can be enabled. Default is Other.

## Oracle

- Connection name: Required. Enter a new Oracle connection name.
- Username: Required. Enter the Oracle account username.
- Password: Required. Enter the Oracle account password.
- Host: Required. Enter the host number. For example, `192.156.3.123`.

**Note:** If your connection fails, check if the Single Client Access Name (SCAN) feature is enabled on the Oracle Database. Informatica drivers cannot establish connectivity with the database if this feature is enabled. SCAN is a domain name registered to at least one and up to three IP addresses, either in Domain Naming Service (DNS) or Grid Naming Service (GNS). To resolve this issue, get the Virtual IP of the Oracle Database and its corresponding hostname using nslookup on IP. Use this host name in the connection properties.

- Port: Required. Enter the port number. For example, `3305`.
- Service Name: Required. Enter the service name. You can find the service name by connecting to the server as “system” using SID, then executing the query: `select value from v$parameter where name like '%service_name%';`.
- Schema: Required. Enter the schema you want to connect to.
- Code Page: Required. Choose either `MS_1252` or `UTF_8` from the dropdown menu. The code page should be compatible with the Oracle source.

## SalesForce

- Connection name: Required. Enter a new Salesforce connection name.
- Username: Required. Enter the Salesforce account email address.
- Password: Required. Enter the Salesforce account password.
- Security Token: Required. Enter the security token generated from the Salesforce application. If your account requires a security token and you don't have one, you can generate or reset a security token. After logging in to the Salesforce web site, click **Setup > My Personal Information > Reset My Security Token**.
- Service URL: Required. Enter the Salesforce service URL. You can use the following versions of the Salesforce API:
  - Version 31. Salesforce connection uses the following service URL by default: `https://login.salesforce.com/services/Soap/u/31.0`
  - Version 33. You can enter the following service URL to use version 33 of the Salesforce API in the connection: `https://login.salesforce.com/services/Soap/u/33.0`
  - Version 34. You can enter the following service URL to use version 34 of the Salesforce API in the connection: `https://login.salesforce.com/services/Soap/u/34.0`
  - Version 35. You can enter the following service URL to use version 35 of the Salesforce API in the connection: `https://login.salesforce.com/services/Soap/u/35.0`
  - Version 36. You can enter the following service URL to use version 36 of the Salesforce API in the connection: `https://login.salesforce.com/services/Soap/u/36.0`

## SQL Server

- Connection name: Required. Enter a new SQL Server connection name.
- Server Version: Required. Make a selection from the dropdown menu, which includes SQL Server 2000, 2005, 2008, and 2012.
- Username: Required. Enter the SQL Server account username.
- Password: Required. Enter the SQL Server account password.
- Host: Required. Enter the host number. For example, `192.156.3.123`.
- Port: Required. Enter the port number. For example, `3305`.
- Instance Name: Enter the instance name.
- Database Name: Required. Enter the database name you want to connect to.
- Schema: Enter the schema you want to connect to.
- Code Page: Required. Choose either MS\_1252 or UTF\_8 from the dropdown menu. The code page should be compatible with the SQL Server source.

## Teradata

- Connection name: Required. Enter a new Teradata connection name.
- Username: Required. Enter the Teradata account username.
- Password: Required. Enter the Teradata account password.
- Schema: Required. Enter the schema you want to connect to.
- JDBC Connection URL: Required. Enter the JDBC connection URL that you want to connect to. For example, `jdbc:teradata://capri1.teradata.ws`.
- JDBC Jar Directory: Required. Enter the JDBC jar directory that you want to connect to. For example, `/home/admin/pr_temp/jdbc/Teradata`.

## Zendesk

- Connection name: Required. Enter a new Zendesk connection name.
- Username: Required. Enter the Zendesk account email address.
- Password: Required. Enter the Zendesk account password.
- Zendesk Sub-Domain: Required. Enter the URL of the Zendesk account. For example, `https://informaticabusinesssolutionhelp.zendesk.com/api/v2`.