



Informatica Cloud (Version Spring 2015)

Box Connector Guide

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Preface

The *Informatica Cloud Box Connector Guide* contains information about how to set up and use Box Connector. The guide explains how organization administrators and business users can use Box Connector to read data from and write data to Box.

Informatica Resources

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CHAPTER 1

Introduction to Box Connector

This chapter includes the following topics:

- [Box Connector Overview, 7](#)
- [Introduction to Box, 7](#)
- [Box API, 7](#)
- [Box Connector Example, 8](#)

Box Connector Overview

You can use Box connector to connect to Box from Informatica Cloud and then securely read files from or write files to Box.

You can use Box objects as sources and targets in data synchronization tasks, mappings, and mapping configuration tasks. When you run a data synchronization task or a mapping configuration task, the Secure Agent uses the Box API to perform the specified operation.

Introduction to Box

Box is a cloud-based file storage and content management service for enterprises.

You can use Box to securely store, manage, and share files in your enterprise. The users in the enterprise can set access permissions to content in Box and collaborate seamlessly.

Box API

Box provides APIs for third-party applications to perform operations on Box.

When you create a Box connection, you can use the following Box APIs:

Search_Files_or_Folders

Select the Search_Files_or_Folders API to search for files or folders within Box. You can enter the terms that you want to search in the connection properties.

Upload_Files

Select Upload_Files API to upload files into a location in Box.

Download_Files

Select Download_Files API to download files from a location in Box.

Below_are_Lists_of_Files

Select Below_are_Lists_of_Files API to read data to and write data from a CSV file in a Box folder.

Box Connector Example

You can use the Box connector to write data from a Salesforce table to a CSV file in Box.

Your organization needs several members of the organization to collaborate to generate sales leads. You need to write data from a Salesforce table to a CSV file in Box that the members can update with the sales details. You also need to update the sales leads from the CSV file to Salesforce.

Create a data synchronization task to write the data from the Salesforce table to a CSV files in Box. You can provide access to the CSV file to the different members of the organization, who can update sales leads details. Create another data synchronization task that reads data from the CSV file in Box to the Salesforce table. Schedule the data synchronization tasks to run at regular intervals so that the data in both CSV file and the Salesforce table are accurate.

CHAPTER 2

Box Connections

This chapter includes the following topics:

- [Box Connection Overview, 9](#)
- [Box Connection Properties, 9](#)

Box Connection Overview

Create a Box connection to access Box data from Informatica Cloud.

You can create a Box connection on the Connections page and use it in the Mapping Designer when you create a mapping or in the Data Synchronization task wizard when you create a task. The connection becomes available to the entire organization.

Box Connection Properties

The following table describes the Box connection properties:

Connection Property	Description
Runtime Environment	The name of the runtime environment where you want to run the tasks.
Box API	<p>The Box API that you want to use.</p> <p>You can use one of the following API:</p> <ul style="list-style-type: none">- Search_Files_or_Folders. Choose Search_Files_or_Folders to run a task that returns the list of files and folders based on search criteria. You can also select Below_is_Search API to search files or folders.- Download_Files. Choose Download_Files to download files from Box to a location on the local file system.- Upload_Files. Choose Upload_Files to upload files to Box from a location on the local file system.- Below_are_Lists_of_Files. Choose Below_are_Lists_of_Files to read from or write to CSV files in Box.
Is Box API Dynamic	Not applicable.

Connection Property	Description
URI Request Parameters	Search parameters when you use the Search_Files_or_Folders API. For example, you can use the following string when you use the Search_Files_or_Folders API: query=generate;limit=0;offset=0
Source File Path	The directory in the machine that runs the Secure Agent to store files that you upload to Box. You must enter a value when you use the Upload_Files API.
Target File Path	The directory in the machine that runs the Secure Agent to store files that you download from Box. You must enter a value when you use the Download_Files API.
Request Type	The HTTP request type for the API. Only POST is supported in this version.
Client ID	Not applicable.
Client Secret Key	Not applicable.
Authorization Code	Not applicable.
Response Folder Path	Optional. The folder path in the machine that runs Secure Agent to store the full JSON response when you use the Search_Files_or_Folders API.
Secure Credentials File Name	Not applicable.
Create the config.csv file	Not applicable.
Authentication Required	Not applicable.
Access Token	Access token generated by Box. You can generate an access token in the Box Developer Console. The access token expires after two hours of generation. You must edit the connection to update the access token after 2 hours.
Box File or Folder ID	File ID or the Folder ID of the file or folder for which you want to use the connection. You can obtain the File ID or Folder ID from the Box URL of the file or folder. For example, the folder Reports has the following Box URL: <code>https://company.app.box.com/files/0/f/1837615991/Reports</code> 1837615991 is the Folder ID of Reports. You can override this value when you create a data synchronization task or a mapping task.

CHAPTER 3

Data Synchronization Tasks with Box Connector

This chapter includes the following topics:

- [Box Sources in Data Synchronization Tasks, 11](#)
- [Box Targets in Data Synchronization Task, 12](#)
- [Data Synchronization Example, 12](#)

Box Sources in Data Synchronization Tasks

You can use a Box object as a single source in a data synchronization task.

You configure Box source properties on the Source page of the Data Synchronization Task wizard.

The following table describes the Box source properties:

Property	Description
Connection	Name of the source connection.
Source Type	Select Single. Box supports only single as the source type.
Source Object	Name of the source object. You must select Entries as the source object to perform operations on the Box source. When you select entries, data preview displays the list of files and folders in the Box folder that you configured for the connection.

You need to configure specific advanced properties to use a specific source object in a data synchronization task.

Box Source Advanced Properties

You configure the advanced source properties on the Schedule page of the Data Synchronization Task wizard.

The following table describes the advanced source properties for a Box source object:

Property	Description
Source Filter	Filter condition to filter data in Box.
Box Source File ID	The file ID or the folder ID that you want to use in the task. If you do not enter a value, the task uses the ID that you entered in the Box connection.

Box Targets in Data Synchronization Task

When you run a data synchronization task, specify the operation and the source that you want the Secure Agent to write to the target. The Secure Agent inserts, updates, upserts, or deletes source rows that you specify into the target based on the configured operation for the target object.

The task operations depend on the target object that you select. You can configure the target properties when you schedule the data synchronization task. You configure Box target properties on the Target page of the Data Synchronization Task wizard. Enter the name of the target connection and specify the target object to write data to Box.

When you configure a data synchronization task, you can configure the advanced target properties. The advanced target properties appear on the Schedule page of the Data Synchronization Task wizard.

The following table describes the Box advanced target properties:

Property	Description
Box Target File ID	The ID of the file or folder in Box to which you want to write data.
Success File Directory	Not applicable.
Error File Directory	Not applicable.

Data Synchronization Example

You work in the retail industry, and inside sales consultants need to analyze the account details of customers.

The account details are stored in Salesforce and select employees have access to the table in Salesforce. You can create a data synchronization task to write the account details to a CSV file in Box. The inside sales consultants can read the CSV file in Box to analyze the account details of customers.

Sales record files can contain information about products that are sold in multiple outlets and regions. You can consolidate the data from the sales record in Salesforce.

Configure a data synchronization task to read from Salesforce and write to Box. Before you configure the data synchronization task, you must create a Box connection to write to a CSV file.

Create a Box Connection

Create a Box connection that uses the Below_Are_Lists_of_Files API. Enter the folder ID to which you want to write the CSV file.

The following image shows the Box connection:

New Connection

OK Cancel Test

✓ The test for this connection was successful.

Connection Details

Connection Name:*	Box_Customers_Details
Description:	
Type:*	Box Outh (Tanvi)

Box Outh Connection Properties

Runtime Environment:*	INW00006332
Box API:*	Below_are_Lists_of_Files_API
Is Box API Dynamic:	<input type="checkbox"/>
URI Request Parameters:	
Source File Path:	
Target File Path:	
Request Type:*	POST
Client ID:	
Client Secret Key:	
Authorization Code:	
Response Folder path:	
URI Parameters File Name:	
Secure Credentials File Name:	
Create the config csv file:*	YES
Authentication Required:*	YES
Access Token:	vWp0qVzcAnMs4bnKCebUXssqXLSHQPao
Box File or Folder ID:	3636125383

Define the data synchronization task.

Configure a data synchronization task to use the insert operation as shown in the following image:

Data Synchronization Task Wizard

1 Definition 2 Source 3 Target 4 Data Filters 5 Field Mapping 6 Schedule

< Previous Next > Save ▾ Cancel

Task Details

Task Name:* dss_salesforce_box_csv ?

Description:
 ?

Task Operation:* Insert ▾ ?

Use a Salesforce source object.

Select the Salesforce connection and choose Account as the source. The source for the data synchronization task is the Account table that contains the account details of all the customers.

The following image shows the source configuration:

Data Synchronization Task Wizard (dss_salesforce_box_csv)

1 Definition 2 Source 3 Target 4 Data Filters 5 Field Mapping 6 Schedule

< Previous Next > Save ▾ Cancel

Source Details

Connection:* Salesforce_Customer_Account ▾ View... New... ?

Source Type:* ☒ Single ☐ Multiple ☐ Saved Query

Source Object:* Account Select... ?

☐ Display technical names instead of labels
☐ Display source fields in alphabetical order
☐ Include archived and deleted rows in the source

Data Preview

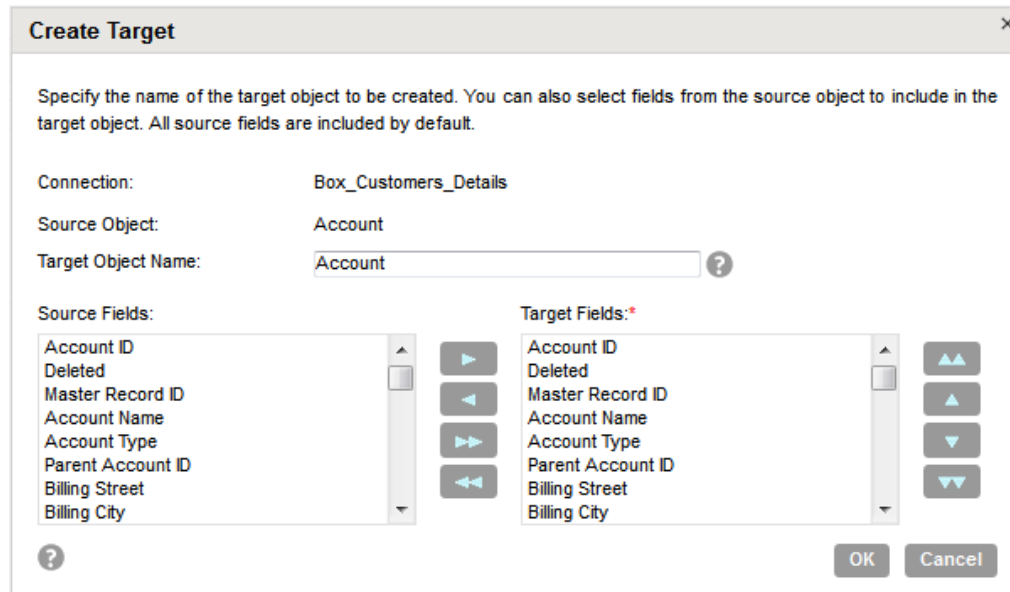
Account Preview All Columns (Total Columns: 60)

Account ID	Deleted	Master Record ID	Account Name	Account Type	...
00190000002MPsTAAW	false		Test_insert_update		...
0019000001EuWnLAAV	false		test_NS_Upsert_ext1		...
00190000008eR6zAAE	false		Sebastian Taylor	Customer - Direct	...
00190000008eR70AAE	false		Thomas Key	Customer - Direct	...
00190000008eR71AAE	false		Ms Gini Daily	Customer - Direct	...
00190000008eR72AAE	false		R Schmidt	Customer - Direct	...
00190000008eR75AAE	false		Paul Lindstrom	Customer - Direct	...
00190000008eR76AAE	false		Ms Gloria Vanarsdale	Customer - Channel	...
00190000008eR77AAE	false		Craig Perkins	Customer - Direct	...
00190000008eR78AAE	false		Suzanne Wessel	Customer - Direct	...

Create a CSV target object in Box.

Select the Box connection that you created to write to CSV files and click Create to create a new CSV file in Box. You edit the fields that you want in the target file.

The following image shows how to create a target:

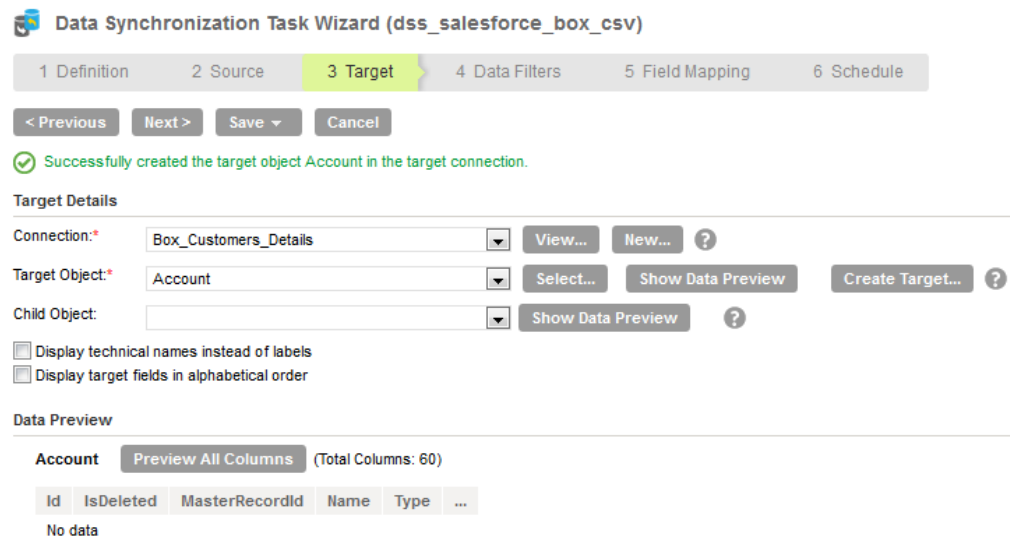


The 'Create Target' dialog box is shown. It has a title bar with a close button (X). The main text says: 'Specify the name of the target object to be created. You can also select fields from the source object to include in the target object. All source fields are included by default.'

Fields in the dialog:

- Connection: Box_Customers_Details
- Source Object: Account
- Target Object Name: Account (with a help icon ?)
- Source Fields: A list box containing Account ID, Deleted, Master Record ID, Account Name, Account Type, Parent Account ID, Billing Street, and Billing City.
- Target Fields: A list box containing the same fields as Source Fields, with up/down arrows on the right.
- Buttons: OK and Cancel at the bottom right.

The following image shows the target configuration:



The 'Data Synchronization Task Wizard (dss_salesforce_box_csv)' is shown, with the '3 Target' step selected. The wizard has tabs for 1 Definition, 2 Source, 3 Target, 4 Data Filters, 5 Field Mapping, and 6 Schedule. Navigation buttons include '< Previous', 'Next >', 'Save', and 'Cancel'.

A green checkmark icon and text indicate: 'Successfully created the target object Account in the target connection.'

Target Details

Connection: Box_Customers_Details (with View..., New..., and ? buttons)

Target Object: Account (with Select..., Show Data Preview, and Create Target... buttons)

Child Object: (empty field with Show Data Preview and ? buttons)

Options:

- ☐ Display technical names instead of labels
- ☐ Display target fields in alphabetical order

Data Preview

Account Preview All Columns (Total Columns: 60)

Id	IsDeleted	MasterRecordId	Name	Type	...
No data					

Configure a field mapping.

Map all the fields under Account to all the fields in the target CSV file. The Data Synchronization application writes the mapped source data to a CSV file in Box.

The following image shows the field mapping:

Data Synchronization Task Wizard (dss_salesforce_box_csv)

1 Definition 2 Source 3 Target 4 Data Filters 5 Field Mapping 6 Schedule

< Previous Next > Save Cancel Refresh Fields Full Screen View

Source: Account

Edit Types

Status	Name
✓	Account ID
✓	Deleted
✓	Master Record ID
✓	Account Name
✓	Account Type
✓	Parent Account ID
✓	Billing Street
✓	Billing City
✓	Billing State/Province
✓	Billing Zip/Postal Code
✓	Billing Country
✓	Billing Latitude
✓	Billing Longitude

Target: Account

Clear Mapping Automatch Validate Mapping Edit Types...

Status	Name	Actions	Expression/Lookup
✓	Id	fx [icon] [icon]	Id
✓	IsDeleted	fx [icon] [icon]	IsDeleted
✓	MasterRecordId	fx [icon] [icon]	MasterRecordId
✓	Name	fx [icon] [icon]	Name
✓	Type	fx [icon] [icon]	Type
✓	ParentId	fx [icon] [icon]	ParentId
✓	BillingStreet	fx [icon] [icon]	BillingStreet
✓	BillingCity	fx [icon] [icon]	BillingCity
✓	BillingState	fx [icon] [icon]	BillingState
✓	BillingPostalCode	fx [icon] [icon]	BillingPostalCode
✓	BillingCountry	fx [icon] [icon]	BillingCountry
✓	BillingLatitude	fx [icon] [icon]	BillingLatitude
✓	BillingLongitude	fx [icon] [icon]	BillingLongitude

Run the data synchronization task.

When you run the data synchronization task, the Secure Agent creates a CSV file in Box with all the rows from the Account table in Salesforce.

CHAPTER 4

Mappings and Mapping Configuration Tasks with Box

This chapter includes the following topics:

- [Mappings and Mapping Configuration Tasks with Box Overview, 17](#)
- [Box Sources in Mappings, 17](#)
- [Box Targets in Mappings, 18](#)

Mappings and Mapping Configuration Tasks with Box Overview

Use the Informatica Cloud Mapping Designer to create a mapping. When you create a mapping, you configure a source or target to represent a single Box object.

Describe the flow of data from source and target along with the required transformations before the Secure Agent writes data to the target. When you create a mapping configuration task, select the mapping that you want to use. Use the Mapping Configuration Task wizard to create a mapping configuration task. The mapping configuration task processes data based on the data flow logic you define in the mapping.

Box Sources in Mappings

In a mapping, you can configure a Source transformation to represent a file or folder in Box.

The general properties display the name and description of the Box source. Configure the source and advanced properties for the source object.

The following table describes the source properties that you can configure in a Source transformation:

Property	Description
Connection	Name of the source connection.
Source Type	Select Single Object. Box connector supports only single object.
Object	Select Entries. Entries lists the files and folders available in the Box folder.

Box Source Advanced Properties

Configure the advanced properties on the Source tab of the Properties panel.

The following table describes the Box source advanced properties that you can configure in a Source transformation:

Property	Description
Source Filter	Filter condition to filter data in Box.
Box Source File ID	The file ID or the folder ID that you want to use in the task. If you do not enter a value, the task uses the ID that you entered in the Box connection.

Box Targets in Mappings

In a mapping, you can configure a Target transformation to represent a single Box target.

The general properties display the name and description of the Box target. Configure the target and advanced properties for the target object.

The following table describes the Box target properties that you can configure in a Target transformation:

Property	Description
Connection	Name of the target connection.
Target Type	Select Single Object . Box connector supports only single object.
Object	Select Entries Entries shows the list of files and folders in the Box folder.
Operation	The target operation.

Box Target Advanced Properties

Configure the advanced properties on the Target tab of the Properties panel.

The following table describes the advanced Box target properties that you can configure in a Target transformation:

Property	Description
Box Target File ID	The ID of the file or folder in Box to which you want to write data.
Success File Directory	Not applicable.
Error File Directory	Not applicable.

You can also configure whether to forward rejected rows to the error file directory. By default, the Secure Agent forwards the rejected rows.

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