



Data Sources

Data sources are the Openprise objects that connect to your actual data for the purpose of **pulling data** into Openprise from your source systems. Your data can be in cloud systems such as Marketo, Salesforce or Eloqua. Or your data can be stored in cloud drives such as Google Drive, Box, Dropbox, or even FTP servers. We even support cloud databases such as Amazon Redshift or Amazon RDS MySQL databases.

To Create a Data Source

1. Go to Data -> Data Sources
2. Click on "Add Data Source"
3. **Data Source Name** - required. This name will be used as an import data source jobs.
4. **Data Source Administrators** - required, only users with Administrator rights can use the Data Source.
5. **Source Technology and Data Format** - Select the source system (can be a sandbox or production environments).
6. **Add Account Information** - Add a valid user for your system.
7. **Directory or Entity** - Folder where the file resides for Cloud drives or Entity for Cloud Systems or Cloud Databases.
8. **Archive this data source** - If checked, Openprise will keep a backup of the original data source for up to 7 days.
9. SAVE

Depending on the source technology and data format selected, the following options may be presented:

1. **Automatically run assessment report** - select this option to have Openprise run a data assessment report, and select the frequency (Weekly, Monthly) from the drop down list.
2. **Email report summary to data source administrators** - select this option to email the summary automatically.

Once a data source has been created, data can be imported.

To Import a Data Source

To import a data source, click on the card of your data source and select Import Now.

The Import menu options are described below:

- **Configuration** - select to change the configuration of the data. This is useful if you want to change the attributes you are pulling in from your Salesforce, Marketo, etc. system. When changing the data source configuration, make sure you select the Parse option (or tab) before proceeding to the Map option. During loading of the Parse page, Openprise goes to your



source system to get the latest data configuration (commonly called a schema), so if you skip the Parse step, you will not be able to view the most up-to-date data configuration.

- **View Data** - use this option to view data belonging to the data source.
- **Import Now** - Select this option to load any new data into the Data Source. It is important to note that creating a Data Source doesn't load the data automatically. You must import the data either by selecting this option, or creating a bot with a step that imports data into the data source. With each Data Source import, Openprise gets any changed or new records from the source system. If there is no method for Openprise to determine if a record is new or has been changed since the last import, all data in the source system will be imported. **Note:** There is a limit for how many direct connections can be made at the same time to the same target system. Due to this limitation, it may take some time to import data as each import and export must be queued to accommodate the system's limitations.
- **Download** - select this option to download your data. After naming the data download file, the data is available under the Data > Downloads tab. Large data sources will take some time to be ready for download.
- **Purge - Purge all data** - Use this option to delete all data in your data source. This option, along with a subsequent data import, is useful for systems that delete records directly (as opposed to "marking them deleted"). For these systems (Marketo, Salesforce, etc.), Openprise cannot tell when a record has been deleted in the target system directly, so a periodic purge and re-import is recommended to synch the data between Openprise and the target system.
- **Purge - Filter then purge** - This option works in the same manner as "Purge all data", except you can first filter the records before purging to delete a portion of the data in your Openprise Data Source.
- **Delete** - use this option to delete the data source AND the data in the data source. If the data source belongs to a bot, an error message will be displayed and the data source will not be deleted. However, if the data source is used by a job and is deleted, the job will be marked with errors (as seen in red text on the job screen).

Notes:

Due to a limitation with Marketo, a Marketo-based data source is limited to 200 or fewer attributes.

Support Contacts

If you have any additional questions, please feel free to contact us at support@openprisetech.com.