

Version

1.3

Anaplan

Anaplan Connect 1.3.3.5

User Guide

Document version 2.2

ANAPLAN TECHNICAL CONTENT TEAM

Anaplan Connect 1.3.3.5 User Guide

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1 What is Anaplan Connect?

Anaplan Connect is an API Client with a command-line interface that supports the following types of Anaplan actions:

- import
- export
- delete - Delete from List using Selection to remove specific items from a list.
- process - a combination of the other types of actions

The advantages include:

- No need for manual work in the Anaplan GUI for each run. You can schedule jobs to run automatically at the interval you want
- No need to code a full-scale software application

This document shows you how to write a file of commands for your operating system.

| Windows | UNIX, Linux, Mac OS |
|---|---|
| Write the batch (.bat) file using TextPad , SublimeText , Notepad, or similar | Write the script (.sh) file using nano , vi , SublimeText , or similar. |
| Use a command prompt to run a batch file , such as myImport.bat | Use Terminal to run a shell script, such as myImport.sh |

For example, say you have a batch file named **RunMyImport.bat** that loads a text file, **Europe.txt**, onto the Anaplan server. If you also use a scheduling tool, the batch file can run itself at any hour and interval you choose (daily, weekly, monthly) without having to log onto Anaplan or be present.

Note:

Anaplan Connect compresses the files during upload. Do not refer to zip files in the .bat or .sh file as this is not supported.

1.1 What's new in 1.3.3.5?

This version is an update to Anaplan Connect v1.3.3.3 and contains the following changes:

- **Security updates:** All Apache libraries have been updated to the latest versions (as of January 2018) for increased security.
- **Retry:** You can now retry failed Anaplan API requests. Anaplan Connect will retry random and infrequent 502 errors that happen in certain situations such as uploading chunks for large files.

- **Version and Script Support:** The v1.3.3.5 zip package layout is the same as v1.3.3.3. You can directly port your existing Anaplan Connect scripts to the new version and execute them.

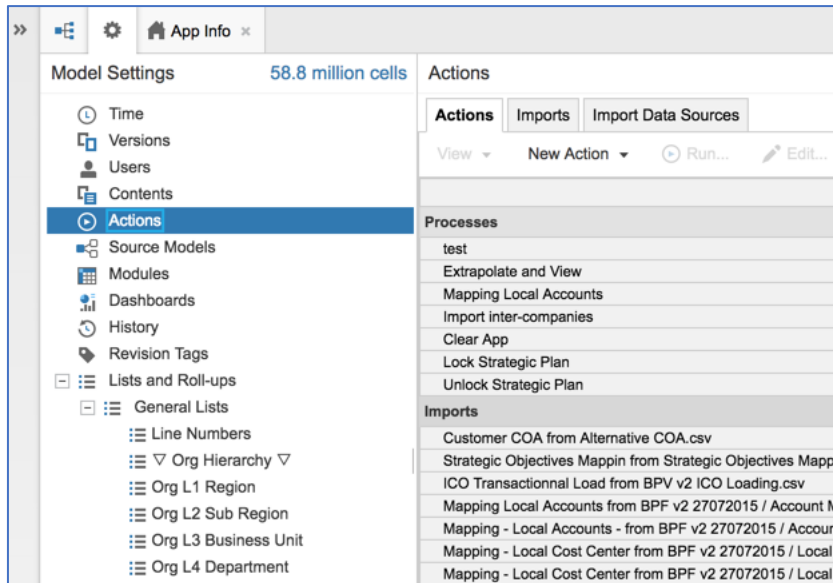
Note:

Both Anaplan Connect versions can co-exist on same system. If you're using Anaplan Connect 1.3.3.3, you can [download version 1.3.3.5](#) to a different directory and choose to run scripts with either version.

2 Prerequisites

2.1 Access to Anaplan model with the actions configured

Open an Anaplan model that has the actions configured (Import, Export, Delete, or Process) that you want Anaplan Connect to run.



If you don't have access to Anaplan, work with someone who has the ability to create actions in Anaplan.

2.2 Java version and third-party data sources

- An installation of Java 7 or 8.
If you want to use Anaplan Connect to import from an ODBC data source, note that Java 8 does not support the JDBC-ODBC Bridge. See: https://blogs.oracle.com/Lance/entry/removal_of_the_jdbc_odbc.
- Anaplan Connect supports Java Database Connectivity (JDBC), which means it's possible to work with many third-party data sources. See:
 - JDBC for Oracle, Access, MySQL, Excel
 - Import through a JDBC Connection for a Microsoft SQL Server database

2.3 If you're using an SSO-enabled workspace

If the actions you want Anaplan Connect to run are for models in a workspace using access, the Anaplan Connect Single Sign-on (SSO) user must be an **Exception User**. An Exception User can authenticate by username and password or by certificate, rather than through SAML.

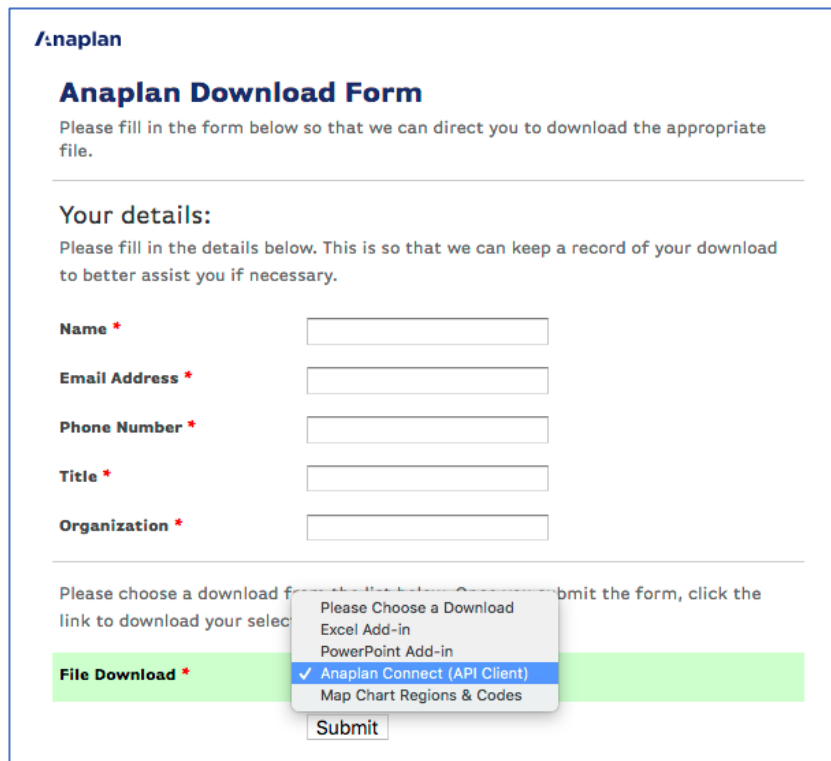
See:

https://help.anaplan.com/anapedia/Content/Administration_and_Security/Security/Single_Sign-on.html.

2.4 Download and Setup

To start automating imports, exports and other actions, download the Anaplan Connect API Client.

1. Go to the Downloads page and complete the Anaplan Download Form.
2. On the **File Download** list, select **Anaplan Connect (API Client)** then click **Submit**.



Anaplan

Anaplan Download Form

Please fill in the form below so that we can direct you to download the appropriate file.

Your details:

Please fill in the details below. This is so that we can keep a record of your download to better assist you if necessary.

Name *

Email Address *

Phone Number *

Title *

Organization *

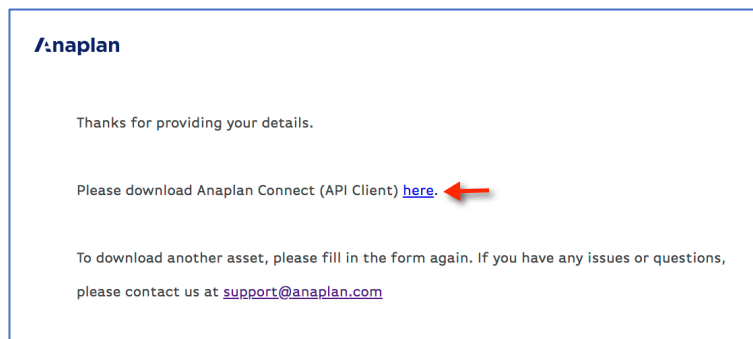
Please choose a download for the file that you want to download. After you submit the form, click the link to download your selected file.

File Download *

- Please Choose a Download
- Excel Add-in
- PowerPoint Add-in
- ✓ Anaplan Connect (API Client)
- Map Chart Regions & Codes

Submit

3. Click the [here](#) link and save the zip file to your hard drive.



Anaplan

Thanks for providing your details.

Please download Anaplan Connect (API Client) [here](#).

To download another asset, please fill in the form again. If you have any issues or questions, please contact us at support@anaplan.com

4. Extract the zip to a directory.

Note:

If the folder name contains parentheses, an error might occur when using Anaplan Connect. Do not install Anaplan Connect to a folder that has parentheses in its name. For example, Program Files (x86).

2.5 Work with Batch Files (.bat)

The following code is in the Anaplan Connect installation folder, *examples\example.bat*.

```
@echo off

rem This example loads a source text file and runs an Anaplan import into a
module.

rem For details of how to configure this script see
doc\AnaplanConnect1.4UserGuide.pdf

set AnaplanUser="fred.smith@mycompany.com:password"

set WorkspaceId="My Workspace"

set ModelId="My Model"

set Operation=-file "My Source.txt" -put "C:\My Source.txt" -import "My Module
from My Source.txt" -execute -output "C:\My Errors.txt"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1

cd %~dp0

if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser% set
Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId%

-model %ModelId% %Operation%

@echo %Command%

cmd /c %Command%

pause
```

| Where... | is... |
|-----------------------------------|--------------------------------|
| fred.smith@mycompany.com:password | Your Anaplan login credentials |
| My Workspace | your workspace ID |
| My Model | your model ID |
| My Source.txt | a flat file in your local host |

| Where... | is... |
|------------------|---|
| C:\My Source.txt | full path to the flat file in your local host |
| C:\My Errors.txt | full path to where you want Anaplan Connect to create a log file in your local host |

Copy the **example.bat** file up one directory, to the root of your Anaplan Connect installation, and rename it *myFirstTest.bat*. This location guarantees that the Anaplan Connect can use any batch file you create.

3 Configuring the batch file

Every batch file contains the following information:

- **Workspace ID.** This is unique and will not change.
- **Model ID.** This is unique to each model and will not change.
- **Anaplan Action.** A specific Import or Export
- **Credentials:** The User Name and Password, unless you are using Certificate-based Authentication.

When running a batch file or script at an interactive terminal, the user is prompted for the password if it is not included in the script.

Note:

A script that runs without user interaction must contain the credentials, so take measures to secure the file, machine, and account.

3.1 Locate the Workspace ID and Model ID

1. Log in to Anaplan.
2. Open the model you want to use.
3. In the upper-right corner, click **Help** > **About**. Note that the About dialog displays the values of the Workspace and Model IDs.
4. Copy the value of the **Workspace ID** to the line of your batch file that begins with *set WorkspaceId=*.
5. Copy the value of the **Model ID** to the line of your batch file that begins with *set ModelId=*.

3.2 Locate the Actions for Anaplan Connect to perform

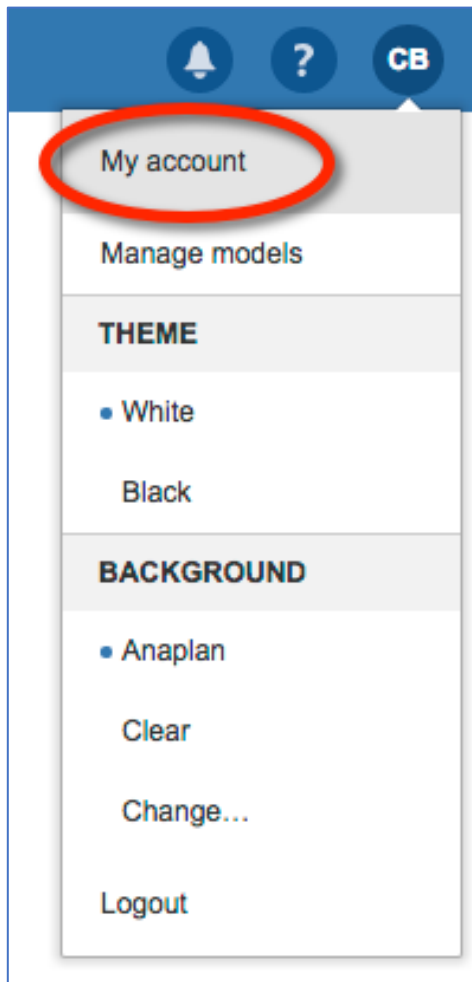
1. Open the Anaplan model that has the actions you want Anaplan Connect to perform.
2. In **Model Settings** > **Actions**, note the exact names of the actions, including capitalization and file extensions.

4 Certificate Authentication

For simplicity, the examples in this document show the use of a User Name and Password. This might be fine for your initial experiments. Be aware, however, that Certificate Authentication is more secure.

4.1 If you want to obtain a digital certificate

1. To access the **Certificates** tab, click the profile icon at the top right and then click **My account**:



2. Select the **Certificates** tab. Here you'll see the certificates that allow you to authenticate when using [Anaplan Connect](#).

Certificates [What's this?](#)

Generate and download a new certificate by clicking "Create New Certificate" below. Certificates can be used for API authentication, as explained in the Anaplan Connect user guide.

Information about active certificates is displayed in the table below.

| Serial Number | Creation Date | Expiry Date | |
|---------------|---------------|-------------|------------------------|
| 196800 | 22 Mar 2018 | 10 Dec 2018 | Revoke |
| 216768 | 22 Mar 2018 | 10 Dec 2018 | Revoke |

[Create new Certificate](#)

- Click **Create new Certificate** to obtain a valid certificate tied to your user name. You'll be prompted to download a newly-generated certificate (a CER file). Save this file locally on your file system.

Note:

Once you've downloaded the Anaplan certificate, it is under your control and Anaplan Inc. is not responsible for keeping it secure.

4.2 Configure Anaplan Connect to use a certificate for authentication

Use Option 1: the `-certification` option, or Option 2: KeyStore.

4.2.1 Option 1: the `-certificate` option

Provide Anaplan Connect with the location of the downloaded certificate (CER file) by using the `-certificate` option.

```
set WorkspaceID="Company Workspace"

set ModelID="Financial Model"

set Operation - certificate "C:\anaplan-connect-1-3-3-5\certificate-
123456789.cer" -export
```

For Mac OS or Linux, the line with the `-certificate` option might look like the example below, but on a single line.

```
Operation="-certificate '/Users/yourname/Documents/anaplan-connect-1-3-3-
5/certificate-123456789.cer'

-process 'Add New Data1'

-execute"
```

```
#!/bin/sh

# This example uploads a file and runs an import

WorkspaceId="12345678912345678912345678912345"

ModelId="09876543209876543209876543209876"

Operation="-certificate '/Users/yourname/Documents/anaplan-connect-1-3-3-5/certificate-09876543209 8765432098765432098765432098.cer' -process 'Add New Data1' -execute"

# _____ Do not edit below this line _____

if [ "${AnaplanUser}" ]; then

    Credentials="-user ${AnaplanUser}"

fi

echo cd "`dirname "$0"`"

cd "`dirname "$0"`"

if [ ! -f AnaplanClient.sh ]; then

    echo "Please ensure this script is in the same directory as AnaplanClient.sh."
    >&2

    exit 1

elif [ ! -x AnaplanClient.sh ]; then

    echo "Please ensure you have executable permissions on AnaplanClient.sh." >&2

    exit 1

fi

Command="./AnaplanClient.sh ${Credentials} -workspace ${WorkspaceId} -model ${ModelId} ${Operation}"

/bin/echo "${Command}"

exec /bin/sh -c "${Command}"
```

4.2.2 Option 2: KeyStore

1. Store the certificate in a password-protected Java KeyStore under an alias.
2. Provide the path to the KeyStore, the KeyStore password, and the certificate alias to Anaplan Connect using the *-keystore*, *-keystorepass*, and *-keystorealias* options.

For instructions on how to import a certificate into a Java KeyStore, see the [keytool documentation](#).

5 Create an Import File

5.1.1 Example batch file for import

```
@echo off

rem This example loads a source text file and runs an Anaplan import into a
module.

rem For details of how to configure this script see doc\Anaplan Connect User
Guide.doc

set AnaplanUser=anaplan.user@anaplan.com:Password

set WorkspaceId="8a1234567897c12b014bf01234567890"

set ModelId="CD1234D60CA84E9A123C1C5D061C1234"

set Operation=-file "Employee.txt" -put "C:\AnaplanConnect\Import\Employee.txt"
-import "New Hire from Employee.txt" -execute -output "C:\My Errors.txt"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1 cd %~dp0

if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%

set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model
%ModelId% %Operation%

@echo %Command%

cmd /c %Command%

pause
```

5.2 Set the Import Operation

The name of the Import action should indicate the name of the file (or other source) from which data will be imported, such as *Import From Employee.txt*.

Example:

```
set Operation=-file "Employee.txt" -put "C:\AnaplanConnect\Import\Employee.txt"
-import "New Hire from Employee.txt" -execute -output
"C:\ImportDumpFilesDirectory"
```


where:

| | |
|---|---|
| -file "Employee.txt" | indicating that the action uses a file named <i>Employee.txt</i> . Note that .csv format is also supported. |
| -put "C:\AnaplanConnect\Import\Employee.txt" | uploading the file to the specified absolute or relative path to the Anaplan Server. |
| -import "New Hire from Employee.txt" | an Import action with the specified name. To see this name in Anaplan, in Settings click Actions and view the list of Imports. Name your import (or export) action such that it matches the name of the file. |
| -execute | runs the action |
| -output "C:\ImportDumpFilesDirectory" | generating a file at the specified directory that lists any Import errors. This is optional. This file is created only if at least one Import error occurs. |

5.2.1 Mac OS example for Import

Compare the double-quotes of Windows with the single-quotes of Mac OS and Linux.

| | |
|-------------------------|---|
| Windows | <code>-put "C:\testdata\Europe P&L.txt"</code> or: <code>-p "C:\testdata\Europe P&L.txt"</code> |
| Mac OS and Linux | <code>-put '/Users/user1/testdata/Europe P&L.txt'</code> or: <code>-p '/Users/user1/testdata/Europe P&L.txt'</code> |

5.2.2 Mac OS Import code

```
#!/bin/sh # This example uploads a file and runs an import

AnaplanUser=firstname.lastname@yourcompany.com

WorkspaceId="yourWorkspaceId"

ModelId="yourModelId"

Operation="-file 'file-to-import.csv' -put

'/path/to/anaplan-connect/file-to-import.csv' -import

'ImportDefinitionName'

-execute -output 'MyImportErrors.txt'"

# _____ Do not edit below this line _____

if [ "${AnaplanUser}" ]; then

Credentials="-user ${AnaplanUser}"

Fi

echo cd "`dirname "$0"`"

cd "`dirname "$0"`"

if [ ! -f AnaplanClient.sh ]; then

echo "Please ensure this script is in the same directory as AnaplanClient.sh."
>&2

exit 1

elif [ ! -x AnaplanClient.sh ]; then

echo "Please ensure you have executable permissions on AnaplanClient.sh."
>&2

exit 1

fi

Command="./AnaplanClient.sh ${Credentials} -workspace ${WorkspaceId}

-model ${ModelId} ${Operation}"

/bin/echo "${Command}"

exec /bin/sh -c "${Command}"
```

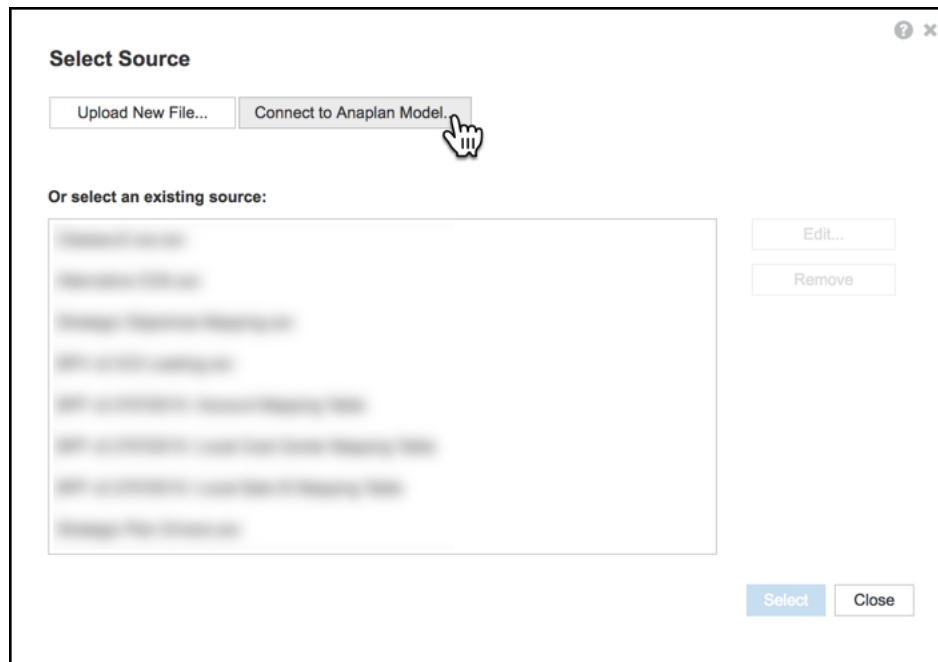
To run the shell script, at the command prompt type:

```
./RunMyImport.sh
```

5.3 Model-to-model Import

This example runs a model-to-model import within Anaplan, transferring data from the **Installation Sales** module in *Model2* to the **P&L** module in *MyBudgetModel*.

1. Run the import manually. On the **Data** menu, click **Import** then click **Connect to Anaplan Model**.



2. Select a module (or list) as the source of the import.

Note the **Import ID** that will be used in the batch file, which in the example below is *P&L from Model2 / Installation Sales*.

3. Click **Run Import** then edit and run the batch file.

There is a space before and after the forward slash "/" in the string 'P&L from Model2 / Installation Sales'.

```
@echo off

rem This example runs a model to model import within Anaplan.

set AnaplanUser="firstname.lastname@ " company.com

set WorkspaceId="8a819488459fa63301462b73fe785786"

set ModelId="CB0A5A4D5C5943B5837FF42C5FAA95E1"

set Operation=-import "P&L from Model2 / Installation Sales" -execute

rem *** End of settings - Do not edit below this line ***
```

6 Create an Export File

6.1 Example Batch file for Export

```
@echo off

set AnaplanUser=Anaplan.User@anaplan.com:Password

set WorkspaceId="8a1234567897c12b014bf01234567890"

set ModelID="CD1234D60CA84E9A123C1C5D061C1234"

set Operation=-export "Employee by Department.xls" -execute -get
"C:\Employee.xls"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1

cd %~dp0

if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%

set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model
%ModelId% %Operation%

@echo %Command%

cmd /c %Command%

pause
```

6.2 Set the Export Operation

Example:

```
set Operation=-export "Employee by Department.xls" -execute -get
"C:\Employee.xls"
```

where:

| | |
|--------------------------------------|--|
| -export "Employee by Department.xls" | Indicating that Export action exists, named "Employee by Department.xls" |
| -execute | runs the Export |
| -get "C:\Employee.xls" | creates a new file with the exported data at the specified path |

An Export action cannot generate an error file, so we do not specify a path for it.

6.3 Mac OS Example for Export

```
# This example runs an export, then downloads the file to the client.

# In the Operation, specify the name of the Export definition before
# giving the path to client file the server will create.

AnaplanUser=firstname.lastname@company.com

WorkspaceId="8a819488459fa63301462b73fe785786"

ModelId="85EFA3E719AF49E183118A58C644D802"

Operation="-export 'company-summary-export-definition' -execute -get
'/Users/username/Downloads/Company Summary.csv'"
```

6.4 Getting Metadata for an Export

The following shell script uses the **-emd** command to get metadata for the specified export:

```
#!/bin/sh # This example gets export metadata

AnaplanUser=john.doe@anaplan.com

WorkspaceId="8a819488459fa63301462b73fe785786"

ModelId="85EFA3E719AF49E183118A58C644D802"

Operation="-export 'Archived Opportunities - Account.xls' -emd"
```

6.4.1 Output

```
Export: Archived Opportunities - Account.xls

columns: 15

rows: 780

format: application/vnd.ms-excel

delimiter: null

encoding: null

separator: null

col 0:

name:

type: ENTITY

list:

col 1:

name: Forecast

type: NUMBER

...
```

7 Create a Delete File

7.1 Example Batch file for Delete

```
@echo off

rem This example deletes obsolete customers from a list

set AnaplanUser=firstname.lastname@company.com

set WorkspaceId="8a1234567897c12b014bf01234567890"

set ModelId="CB0A5A4D5C5943B5837FF42C5FAA95E1"

set Operation=-action "Delete from Customers Using Obsolete" -execute

rem *** End of settings - Do not edit below this line ***
```

7.2 Set the Delete operation to delete items from a list

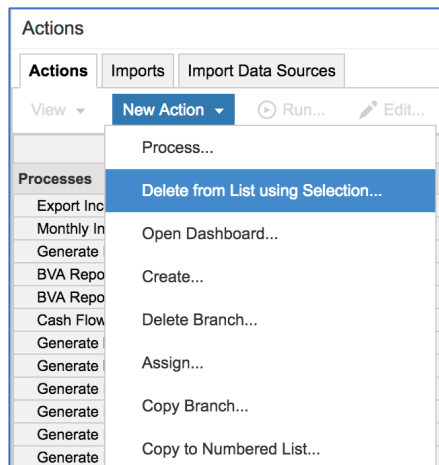
This example shows how to automate deleting items from a list based on Boolean criteria.

For example, you might want to automatically delete items in a list that are now obsolete, such as customers with a rating less than, or equal to, 2. The *Obsolete* line item has Boolean data type and must be set up to be a formula:

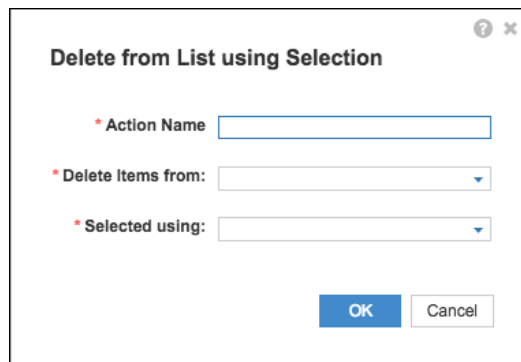
```
Obsolete = Rating <= 2
```

Line items of Boolean data type that only have the dimensionality of the list can be used as the criteria to determine which items to delete.

1. In Anaplan, go to **Model Settings > Actions**.
2. On the **New Action** list, click **Delete from List using Selection**.



The Delete from List using Selection dialog appears.



3. In the **Action Name** box, type the text that you want to appear on the button.
4. On the **Delete Items from** list, select the list (for example *Customers*) from which items will be deleted.
5. On the **Selected using** list, select the line item that contains the selection criteria (for example *Customer Rating.Obsolete*).
6. Click **OK**. The action appears under **Other Actions**.

See [Delete from List using Selection](#) in [Anapedia](#).

Example:

```
set Operation=-action "Delete from Customers Using Obsolete" -execute
```

where:

| | |
|--|---|
| -action "Delete from Customers Using Obsolete" | an Other Action (neither Import nor Export) named <i>Delete from Customers Using Obsolete</i> |
| -execute | runs the Delete |

8 Create a Process File

A Process is a list that contains any combination of Imports, Exports, and/or Deletes.

You don't need to run the process manually within Anaplan before calling it in the Anaplan Connect script.

An example batch file for a process that contains two *Import* actions and two *Export* actions is shown below. Note that the process can also contain *Delete* actions:

```
@echo off

rem This example runs a Process that contains multiple Export actions

set AnaplanUser="firstname.lastname@company.com"

set WorkspaceId="8a1234567897c12b014bf01234567890"

set ModelId="CB0A5A4D5C5943B5837FF42C5FAA95E1"

set Operation=-file "file1.txt" -put "data/ImportModule.csv" -file "file2.txt" -
put "data/ExportList.csv" -process "Import Export Delete" -execute -file
"ExportList" -get "export/ProcessExportList.csv" -file "ExportModule" -get
"export/ProcessExportModule.csv" -output "C:\MyDirectoryForImportDumpFiles"

rem *** End of settings - Do not edit below this line ***
```

8.1 Set the Process Operation

```
set Operation=-file "file1.csv" -put "data/ImportModule.csv" -file "file2.csv" -
put "data/ImportList.csv" -process "Import Export Delete" -execute

-file "ExportList" -get "export/ProcessExportList.csv" -file "ExportModule" -get
"export/ProcessExportModule.csv" -output
"MyImports/MyDirectoryForImportDumpFiles"
```

Where:

| | |
|--|---|
| -file "file1.csv" -put "data/ImportModule.csv" | Uploads the local file <i>data/ImportModule.csv</i> to the Anaplan server so that its data can be stored into the Import data source named <i>file1.csv</i> . |
| -file "file2.csv" -put "data/ImportList.csv" | Uploads the local file <i>data/ImportList.csv</i> to the Anaplan server so that its data can be stored into the Import data source named <i>file2.csv</i> . |

| | |
|---|---|
| -process "Import Export Delete" -execute | Runs the process named <i>Import Export Delete</i> |
| -file "ExportList" -get "export/ProcessExportList.csv" | Downloads the data last exported by the export <i>ExportList</i> to the local file <i>export/ProcessExportList.csv</i> |
| -file "ExportModule" -get "export/ProcessExportModule.csv" | Downloads the data last exported by the export <i>ExportModule</i> to the local file <i>export/ProcessExportModule.csv</i> |
| -output "MyImports/MyDirectoryForImportDumpFiles" | Generates a file for each import action within the specified directory that lists one or more import errors |

8.2 End Users versus Workspace Administrators

An end user can run the same actions through Anaplan Connect that the end user can run manually.

| | End User can run... | Workspace Admin can create and run... |
|----------------|--|---|
| Import | <ul style="list-style-type: none"> model-to-model import from Salesforce.com list imports - requires write access to the target list module imports - requires write access to the target module | any type of import, including imports that involve uploading external files or data |
| Export | Requires read access to the module or list. | export |
| Delete | Requires write access to the list. | delete |
| Process | Requires access to the actions in the process | process |
| Info | | <ul style="list-style-type: none"> Can change the model, unless the role is <i>No Access</i> to a particular model, which also prevents the Workspace Admin from finding the model. Can have a role that has access to no module but can grant self rights to the module. |

8.3 Scheduling an import or export

A batch file that runs the import or export can be scheduled to run at a specific time, as a one-time operation, or recurring at the interval you choose, such as daily, weekly, or monthly. The scheduler is not part of Anaplan Connect, and the scheduling program and set-up depends on your operating system; the computer must be running at the scheduled time.

In the batch file, the password needs to be appended to the Anaplan user name.

```
set AnaplanUser=firstname.lastname@company.com:'mysecretpassword'
```

8.3.1 Windows

Optionally, you might want to remove the **pause** command at the end of the batch file. The pause command leaves the messages on the screen that record what the batch file has done.

Scheduler for Windows XP

This example shows the steps involved on a Windows XP operating system to schedule an import on a specific day and time, once a month:

- Start > All Programs > Accessories > System Tools > Scheduled Tasks > Add Scheduled Tasks > Next > Browse

```
C:\anaplan-connect-1-3-3-5\RunMyImport
```

- Monthly > Next > The First Monday at 05.00 > Enter name & password for the PC > **Finish**

Scheduler for Windows 7

The Scheduler in Windows 7 is almost the same as XP:

- Start > All Programs > Accessories > System Tools > Task Scheduler > Create Basic Task > *Name the task* > Next > Set when to trigger the task > Next > Select Start a program and browse to *C:\anaplan-connect > RunMyImport* > Next > Finish

8.3.2 Mac OS, Linux, or UNIX

Consider using a job scheduling utility for Unix-like operating systems, such as [cron](#).

9 Troubleshooting Tips

9.1 Getting Debug Information

To get verbose command-line output that might be useful for debugging, include the **-debug** argument at the beginning of the Operation statement.

```
set Operation="-debug -file 'file-to-import.csv' -put '/path/to/anaplan-
connect/file-to-import.csv' -import 'Organization from Salesforce' -execute -
output 'MyImportErrors.txt'"
```

9.1.1 Symptoms and Remedies

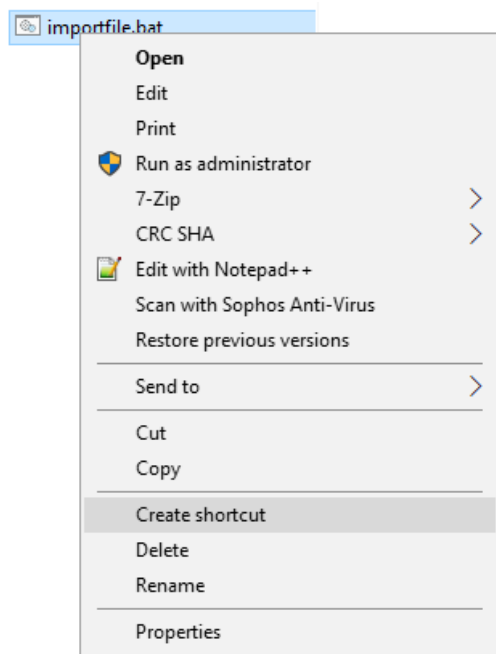
| Symptom | Remedy |
|--|---|
| Error message: <i>“.\AnaplanClient.bat is not recognized as an internal or external command, operable program or batch file.”</i> | Move the .bat file to the root of your Anaplan Connect installation. This location guarantees that Anaplan Connect can use any batch file you create. |
| The batch file appears to run, but numbers do not appear to come through into Anaplan | <ul style="list-style-type: none"> Try changing page, refreshing the browser, or closing and re-opening the target module. The target module might have already been open when you ran the batch file, in which case it would need some event to trigger recontacting the Anaplan server, which refreshes the view with the latest data. Check syntax details. For example, that variables such as the file name are enclosed in straight double quotes " " (as typed in Notepad), not curly double quotes “ ” (as typed in MS Word). A percent sign (%) anywhere in a batch file (such as in a file or import name) probably needs escaping Escape a leading dollar sign (\$) in a shell script unless it is inside single quotes. You might need to escape; a single quote ('); around a word containing an apostrophe ('Jane's'); double-quote ("Jane") or; backtick \ backquote \ accent grave (`). A common problem for .sh files is not having execute permissions on the file you want to copy. You can grant execution permission with the command <code>chmod +x filename.sh</code> |

| Symptom | Remedy |
|--|---|
| Model-to-model import | Make sure there is a space before and after the / in the syntax -import “ <i>Target Module from Source Model / Source Module</i> ” |
| If you’re deleting items from a list | <p>Check that the list does not contain summary items or subtotals. Such lists cannot use the Delete action (due to the difficulty of dealing with <i>orphaned</i> subtotals that lack children).</p> <p>Lists that have parent hierarchies or top-level items can use the bulk delete action, provided that the list that you are editing does not have subtotals.</p> |
| If you’re performing a SQL query from a Windows machine with the -jdbcquery option, and using the percent character (%) as the wildcard character in a pattern for the like operator | <p>The Windows command processor might perform variable substitution on an expression like '%a%', even though no variable a has been defined, resulting in an empty pattern.</p> <p>If so, escape the % sign with %%. For example, %a% is escaped by %%a%%</p> |

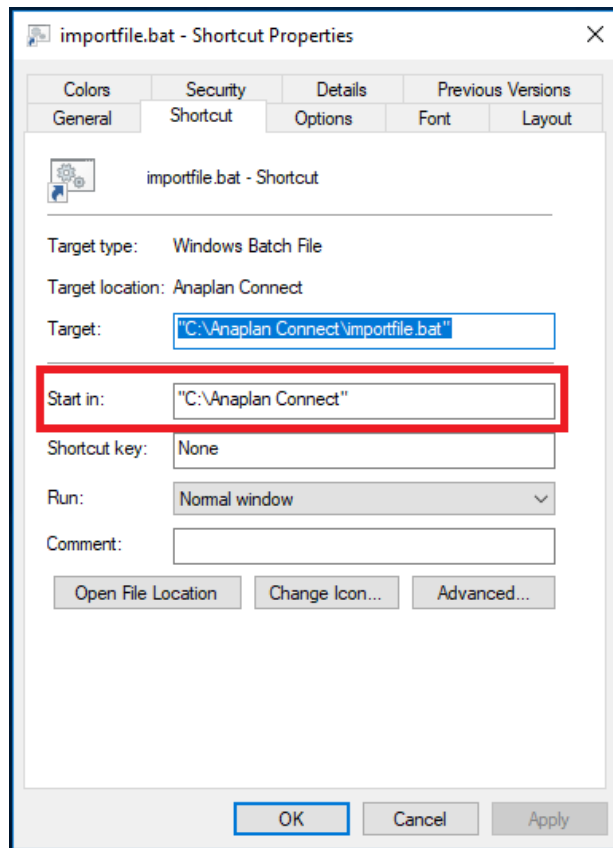
Appendix A: Network drive as location for Anaplan Connect

This example is for **Windows**.

1. Put a copy of *example.bat* (in the Anaplan Connect **examples** folder) into the main Anaplan Connect folder.
2. Replace line 13:
`cd %~dp0`
with:
`pushd %~dp0`
3. Before the pause line, insert **popd**.
4. Create a shortcut to the batch file in the same directory. Right-click and select **Create shortcut**.



5. Once the shortcut is created, right-click on the shortcut and select **Properties**.
6. On the **Shortcut** tab, in the **Start in** box type the local directory that runs Anaplan Connect. For example, %USERPROFILE% can substitute the user's profile folder.



When given a UNC path (`\\computer\share\...`), the **pushd** will map the share to a drive, typically Z: or the last unmapped drive letter. The **popd** will unmap the drive and return to the original location. If the command window is closed before the program completes, the drive will remain mapped.

Appendix B: Java Compatibility

Java 6 is not supported. Anaplan Connect supports Java 7 and Java 8. You should upgrade to Java 8 to benefit from the security offered by TLS 1.1 if your organization uses Java 6.x or 7.x with Anaplan Connect.

Note:

ODBC is officially deprecated in Java 8. Make sure you update any ODBC connections to use JDBC. See [Appendix D: JDBC for Oracle, Access, MySQL, Excel](#) and [Appendix E: Import through a JDBC Connection for a Microsoft SQL Server database](#).

Use one of the options below to upgrade to Java 8.

B.1 Option 1

Write a shell script that sets the **JAVA_HOME** environment variable to the location of the Java 8 Runtime Environment you want to use. You only need to carry out this change to run the Anaplan Connect script.

B.2 Option 2

Contact Anaplan Support for a script to replace **AnaplanConnect.bat** or **AnaplanConnect.sh**. The replacement script ensures that you are using a supported version of Java for Anaplan Connect.

B.3 Option 3

If you've already installed Anaplan Connect you can create your own replacement script. The instructions in this section do not change the version of Java you use for your other applications.

To create the replacement script:

1. Navigate to the Anaplan Connect directory. For example, on Windows, the directory might be *C:\anaplan-connect-1-3-3-5*.
2. Make a backup copy of the script that calls Anaplan Connect:
 - **Windows:** Make a copy of *AnaplanClient.bat* and name it *AnaplanClient.bat-OLD*.
 - **Linux/UNIX/MacOS:** Make a copy of *AnaplanClient.sh* and name it *AnaplanClient.sh-OLD*.

3. Edit the script that calls Anaplan Connect:

- **Windows:** In **AnaplanClient.bat** replace `%JAVA%` with the version directory of Java 8 to use for Anaplan Connect.
- **Linux/UNIX/MacOS:** In **AnaplanClient.sh** replace `${java}` with the version directory of Java 8 to use for Anaplan Connect.

| | Windows .bat file | Linux/UNIX/MacOS .sh file |
|-------------------------|---|--|
| Original | <pre>rem Start the Java virtual machine "%JAVA%" %JAVA_OPTS% - classpath "%CP%" com.anaplan.client.Program %*</pre> | <pre># Start the Java virtual machine exec \${JAVA_OPTS} -classpath "\${classpath}" "\${java}" com.anaplan.client.Program "\$@"</pre> |
| Change to Java 8 | <pre>rem Start the Java virtual machine "C:\Program Files\Java\jre1.8.0_66\bin\java " %JAVA_OPTS% -classpath "%CP%" com.anaplan.client.Program %*</pre> | <pre># Start the Java virtual machine for MacOS involves /Library exec "/Library/Java/JavaVirtualMac hines/jdk1.8.0_60.jdk \${JAVA_OPTS} - classpath/Contents/Home/bin /java" "\${classpath}" com.anaplan.client.Program "\$@"</pre> |

The directory name on your computer might differ from these examples. For more information, visit the [Data Integration Knowledge Base](#) on Anaplan Community.

Appendix C: List of all the Operation Commands

Navigate to the installation directory and type the following to get a list of the operation commands:

| | |
|-------------------------|--|
| Windows | C:\Windows\AnaplanConnect\AnaplanClient.bat -version |
| Java | AnaplanClient - version |
| Mac, UNIX, Linux | ./AnaplanClient.sh ./AnaplanClient.sh -version |

The following table shows the commands for the operation line of the batch file. The abbreviated syntax can be used to reduce typing, for example `-x` instead of `-execute`. Some operations are followed by a variable, such as a path to a file. For example, `-put "C:\testdata\Europe P&L.txt"` or `-p "C:\testdata\Europe P&L.txt"`

| Syntax | Abbreviated Syntax | Followed by a variable, if applicable | What it does |
|--------------|--------------------|---------------------------------------|--|
| -help | -h | | Display this help |
| -debug | -d | | Show detailed (verbose) output, which can help you debug any problems. See Getting Debug Information. |
| -quiet | -q | | Show less detailed output |
| -service | -s | | API service endpoint (defaults to https://api2.anaplan.com/) |
| -user | -u | username:password | Anaplan user name and optional password in the format <i>username:password</i> . If the batch file (or shell script) does not set a value for the AnaplanUser, the program prompts the user to supply the username, then the password. |
| -certificate | -c | Pathname on local machine | Path to user certificate used for authentication (an alternative to using a key store) |
| -keystore | -k | Pathname on local machine | Path to local key store containing user certificate(s) for authentication |

| Syntax | Abbreviated Syntax | Followed by a variable, if applicable | What it does |
|----------------|--------------------|---------------------------------------|--|
| -keystorepass | -kp | Password | <p>Password for the key store.</p> <p>If this option is not provided, and the file <code>~/.anaplan/api-client/keystore-access.txt</code> exists (where <code>~</code> is the user's home directory), the password is read and decoded from the contents of this file. Otherwise, the user is prompted for a password.</p> <p>Note that obfuscation is the URL-encoded form of the result of: taking the exclusive -or of each of the characters in the password and the value 129</p> |
| -keystorealias | -ka | Alias | Alias of the public certificate in the specified key store |
| -via | -v | Proxy URL | Use specified proxy |
| -viauser | -vu | username:password | Pass credentials to authenticating proxy. Consider NTLM Authentication using JCIFS |
| -workspaces | -W | | <p>To get workspace values from a batch file (or shell script), use the -W flag.</p> <p># This example lists the workspaces</p> <pre>AnaplanUser=firstname.lastname @company .com WorkspaceId= "8a819488472c2c950147411f574a085b" ModelId= "B378C20804234C1BBFBAB0D7EF1CD1D3 " Operation= "-W" The output lists Workspace ID followed by Workspace Name: 8a8194824317414b0143540f2d5e357d Finance 8a819488472c2c250147411f574a085b Sales</pre> |
| -workspace | -w | Workspace name or ID | Select a workspace by ID or name |

| Syntax | Abbreviated Syntax | Followed by a variable, if applicable | What it does |
|----------|--------------------|---------------------------------------|---|
| -models | -M | | <p>List available models in selected workspace</p> <p>To get model values from a batch file (or shell script), use the -M flag.</p> <p># This example lists the models</p> <p>AnaplanUser=firstname.lastname@company .com</p> <p>WorkspaceId="8a819488472c2c950147411f574a085b"</p> <p>ModelId="B378C20804234C1BBFBAB0D7EF1CD1D3"</p> <p>Operation= "-M"</p> <p>The output lists Model ID followed by Model Name:</p> <p>7C5B30DE5C374163A23ADD6D2B0622F8</p> <p>Financial Consolidation</p> <p>569418FFCDF041678273620FFCDE2330</p> <p>Sales Rep Territory</p> |
| -model | -m | Model name or ID | Select a model by ID or name |
| -modules | -MO | | List available modules in selected model |
| -module | -mo | Module name or ID | Select a module by ID or name |
| -views | -VI | | List available views in selected module |
| -view | -vi | View name or ID | Select a view by ID or name |
| -files | -F | | List available files on the Anaplan server in selected model |
| -file | -f | File name on Anaplan server | Select a server file by ID or name |
| -get | -g | Pathname on local machine | Download the specified file |
| -gets | | | Write specified server file to standard output |
| -getc | | | Write tab-separated sever file to standard output |
| -put | -p | Pathname on local machine | Upload the specified file |

| Syntax | Abbreviated Syntax | Followed by a variable, if applicable | What it does |
|------------|--------------------|---|---|
| -puts | | | Upload to specified server file from standard input |
| -putc | | | Upload to specified server file from tab-separated standard input |
| -imports | -l | | <p>List available imports in selected model</p> <p>The output lists all the import definitions that are available in a given model. The list of imports and exports is also available in Anaplan. To view, on the Settings tab, click Actions.</p> <p>Similarly:</p> <ul style="list-style-type: none"> to list the available file IDs on the Anaplan server, use <code>–files</code> for models use <code>–models</code> for workspaces use <code>–workspaces</code> for other actions, such as Delete actions, use <code>–actions</code>. |
| -import | -i | Import name or ID | Select an import by ID or name |
| -exports | -E | | List available exports in selected model |
| -export | -e | Export name or ID | Select an export by ID or name |
| -actions | -A | | List available actions in selected model, such as delete actions. This list corresponds to the Other Actions (Settings tab, Actions) list, and does not include Processes, Imports, or Exports. |
| -action | -a | Action name or ID | Select a saved action. For example, Delete items from a list. |
| -processes | -P | | List available processes in selected model |
| -process | -pr | Process name or ID | Select a process by ID or name |
| -locale | -xl | ISO language & country code separated by underscore. For example, 'en_US' | Specify the locale to use when performing the server operation, which affects the available date formats when parsing date values in imports, and the month names when using a specified timescale format. For details, see |

| Syntax | Abbreviated Syntax | Followed by a variable, if applicable | What it does |
|--------------------|--------------------|--|---|
| | | | http://docs.oracle.com/javase/8/docs/api/java/util/Locale.html . |
| -connectorproperty | -xc | Property identifier and value separated by colon. If value is ?, prompt user | Specify import data source connection property. For example, Salesforce credentials. |
| -mappingproperty | -xm | Dimension and value separated by colon. If value is ?, prompt user | Specify prompt-at-runtime import mapping value |
| -execute | -x | | Run the preceding -import, -export, -process or -action |
| -output | -o | Pathname on local machine | Retrieve dump file for completed import |
| -emd | | | Get metadata for an export |

Appendix D: JDBC for Oracle, Access, MySQL, Excel

Provided you have the appropriate JDBC driver, you can link directly into Anaplan from databases such as Oracle, Access, MySQL, or from Excel. Both lists and data can be imported into Anaplan in this way, and when combined with a scheduler, can be updated on a regular basis automatically.

The command contains a single argument `-jdbcproperties`, which provides the path to a properties file.

```
set Operation=-file "Anaplan_Demo_Sql" -jdbcproperties
</path/to/jdbc.properties>
```

The *jdbc.properties* file contains the connection details including the path to the database, username, password, and the query string.

```
# JDBC Connection string (Oracle, Mysql, H2, etc.)
jdbc.connect.url= "jdbc:mysql://localhost:3306/apcustomer"

# JDBC login username
jdbc.username=user1

#JDBC login password
jdbc.password=dbpasswordforuser1

# (Optional) JDBC Fetch size, might not be applicable for all JDBC flavors.
jdbc.fetch.size=10

# Boolean flag, needs to be true if provided {jdbc.query} is a
# stored-procedure/function call.
# Defaults to false if no value provided, or invalid.
jdbc.isStoredProcedure=false
```



```
# SQL query could be Select or a Stored-Procedure/Function call. In case of
latter,

# require {jdbc.isStoredProcedure} above set to "true".

# NOTE: SQL query needs to be parametrized with ? placeholders and values for
# placeholders needs to be provided below in {jdbc.params}.

jdbc.query=" SELECT * FROM Anaplan where col1 = ? and col2 = ?"

# JDBC parameters for parametrized SQL query in {jdbc.query} above.

# NOTE: Number of parameters must equal to the number of parameters provided in
{jdbc.query} above.

jdbc.params= 1234,ABC
```

Where:

| | |
|------------------------|--|
| - jdbc.connect.url | <p>-jdbcurl is the location of your database instance. This location does not have to be on the local host if the machine connecting to the database has access to the network location.</p> <p>To connect to an ODBC source (no longer supported in JRE 8+), you must configure your URL as follows:</p> <p><i>"jdbc:odbc:location_of_instance"</i></p> |
| - jdbc.username | <p>The database username.</p> <p>If no user name or password is required by the source, omit the <i>-jdbcuser</i> parameter.</p> |
| - jdbc.password | <p>The database password.</p> <p>If no user name or password is required by the source, omit the <i>-jdbcpassword</i> parameter.</p> |
| - jdbc.fetch.size | <p>Limits the number of rows that will be returned by the query.</p> |
| jdbc.isStoredProcedure | <p>Boolean value that indicates whether the following statement (jdbc.query) is a stored procedure or function call.</p> |
| -jdbcquery | <p>-Specifies the query type</p> <p>-jdbcquery = "SELECT * FROM Anaplan where col1 = ? and col2 = ?" is the query to run.</p> |

| | |
|--------------|--|
| -jdbc.params | JDBC parameters for parametrized SQL query in {jdbc.query} above. -jdbc.params = 1234,ABC |
|--------------|--|

Appendix E: Import through a JDBC Connection for a Microsoft SQL Server database

An alternative to importing data into Anaplan from a file on the local host is to import data from a relational database using a Java Database Connectivity (JDBC) connection.

- The database can be any database that directly supports JDBC.
- Although you write Windows batch files (or Linux/Mac OS shell script files) for Anaplan Connect to run, Anaplan Connect itself is written in Java, and thus is well-suited for JDBC.
- Anaplan Connect supports using JDBC for Import into Anaplan, not for exporting from Anaplan into an external database. In effect, you run a query against the database, but you can't update the database.

E.1 Preparation

If you want to create a connection to a Microsoft SQL Server database:

1. Copy a .jar file from the Microsoft SQL Server database server or client tools directory. If using Microsoft SQL Server 2008, the file name is *sqljdbc41.jar*.
2. Paste the .jar file into the **lib** subfolder of the Anaplan Connect installation.
3. Make sure you have the following information:
 - UNC path to the Sql Server instance
 - Valid user name and password for the database login
 - A valid query to select the data you want brought into Anaplan.
 - For example, `SELECT * FROM MYTABLE`

An example batch file for an Import action through JDBC:

```
@echo off

rem This example loads a source text file and runs an Anaplan import into a
module.

rem For details of how to configure this script see doc\Anaplan Connect User
Guide.doc

set AnaplanUser="Anaplan.User@anaplan.com:Password"

set WorkspaceId="8a8194884b27c72b014bf06a2b227f90"

set ModelId="CD9662D60CA84E9A871C1C5D061C7426"

set Operation=-file "Anaplan_Demo_Sql" -jdbcproperties "C:\My Source.txt" >

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1

cd %~dp0

if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%

set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model
%ModelId% %Operation%

@echo %Command%

cmd /c %Command%

pause
```

E.2 Set the JDBC operation

```
set Operation=-file "Anaplan_Demo_Sql" -jdbcproperties
</path/to/jdbc.properties>
```

The `jdbc.properties` file contains the connection details including the path to the database, username, password, and the query string.

```
# JDBC Connection string (Oracle, Mysql, H2, etc.)

jdbc.connect.url= " jdbc:sqlserver://localhost"

# JDBC login username

jdbc.username=user1

#JDBC login password

jdbc.password=dbpasswordforuser1

# (Optional) JDBC Fetch size, might not be applicable for all JDBC flavors.

jdbc.fetch.size=10

# Boolean flag, needs to be true if provided {jdbc.query} is a
# stored-procedure/function call.
# Defaults to false if no value provided, or invalid.

jdbc.isStoredProcedure=false

# SQL query could be Select or a Stored-Procedure/Function call. In case of
latter,

# require {jdbc.isStoredProcedure} above set to "true".

# NOTE: SQL query needs to be parametrized with ? placeholders and values for
# placeholders needs to be provided below in {jdbc.params}.

jdbc.query=" SELECT * FROM Anaplan where col1 = ? and col2 = ?"
```

```
# JDBC parameters for parametrized SQL query in {jdbc.query} above.

# NOTE: Number of parameters must equal to the number of parameters provided in
{jdbc.query} above.

jdbc.params= 1234,ABC
```

where:

| | |
|--|--|
| -file "Anaplan_Demo_Sql" | <p>The action involves a file with the specified name. (A model-to-model import would not involve a file.)</p> <p>"Anaplan_Demo_Sql" represents the name of the new import file that will show up in Anaplan after the batch file has been run successfully.</p> |
| -jdbcurl "jdbc:sqlserver://localhost" | <p>Get data from a specified URL using a JDBC driver.</p> <ul style="list-style-type: none"> • jdbc:sqlserver means JDBC is the type of connection, sqlserver means Microsoft SQL Server. • localhost means the local computer is acting as the test server. A production server would have a different name and path. |
| -jdbcuser "userName:Password" | <ul style="list-style-type: none"> • -jdbcuser specifies that the user is connecting through JDBC. • "userName:Password" represent the user name and password. |
| -jdbcquery "SELECT * FROM Anaplan_Demo.dbo.Roster" | <p>-jdbcquery specifies the query type.</p> <p>"SELECT * FROM Anaplan_Demo.Table" is the query to run.</p> |

Appendix F: Import through an ODBC Connection for an Oracle database

Note:

This functionality is only available to users on Java 7 or below. ODBC has been deprecated in Java 8.

Open Database Connectivity (ODBC) is similar to JDBC, but you can use ODBC for applications that are written in a language other than Java. To enable Anaplan Connect, a Java application, to connect to an Oracle database, the core of which is a C programming language application, you must reference an ODBC-JDBC bridge.

- We do not reference an ODBC-JDBC bridge for Microsoft SQL Server because SQL Server provides direct JDBC support.
- If you want to use Anaplan Connect to import from an Oracle database, note that Java 8 does not support the JDBC-ODBC Bridge (see https://blogs.oracle.com/Lance/entry/removal_of_the_jdbc_odbc).

F.1 Set the ODBC operation

```
set Operation=-file "Anaplan_Demo_ORA" -jdbcurl "jdbc:odbc:Anaplan_Demo" -
jdbcuser "User:Password" -jdbcquery "Select * from Anaplan"
@echo off

rem This example loads a source text file and runs an Anaplan import into a
module.

rem For details of how to configure this script, see doc\Anaplan Connect User
Guide.doc

set AnaplanUser="anaplan.user@anaplan.com:Password"

set WorkspaceId="8a8194884b27c72b014bf06a2b227f90"

set ModelId="CD9662D60CA84E9A871C1C5D061C7426"

set Operation=-file "Anaplan_Demo_ORA" -jdbcurl "jdbc:odbc:Anaplan_Demo" -
jdbcuser "User:Password" -jdbcquery "Select * from Anaplan"

rem *** End of settings - Do not edit below this line ***

setlocal enableextensions enabledelayedexpansion || exit /b 1

cd %~dp0
```

```

if not %AnaplanUser% == "" set Credentials=-user %AnaplanUser%

set Command=.\AnaplanClient.bat %Credentials% -workspace %WorkspaceId% -model
%ModelId% %Operation%

@echo %Command%

cmd /c %Command%

pause

```

where:

| | |
|------------------------------------|--|
| -file "Anaplan_Demo_ORA" | <p>The action involves a file with the specified name. (A model-to-model import would not involve a file.)</p> <p>"Anaplan_Demo_ORA" represents the name of the new import file that will show up in Anaplan after the batch file has been run successfully.</p> |
| -jdbcurl "jdbc:odbc:Anaplan_Demo" | <p>Get data from a specified URL using a JDBC driver.</p> <ul style="list-style-type: none"> • jdbc:odbc means the type of connection is an ODBC-JDBC bridge • Anaplan_Demo refers to the ODBC connection |
| -jdbcuser "User:Password" | <p>-jdbcuser specifies that the user is connecting through JDBC, which is now possible through the ODBC-JDBC bridge.</p> <p>"User:Password" are credentials for the ODBC connection, which might be different from the credentials for the database or schema.</p> |
| -jdbcquery "SELECT * FROM Anaplan" | <p>-jdbcquery specifies the query type</p> <p>"SELECT * FROM Anaplan" is the query to run</p> |