

Salesforce filter to S3/ADLS

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ReadyFlow: Salesforce filter to S3/ADLS

You can use the Salesforce filter to S3/ADLS ReadyFlow to consume objects from a Salesforce database table, filter them, and write the data as JSON, CSV or Avro files to a destination in Amazon S3 or Azure Data Lake Service (ADLS).

This ReadyFlow consumes objects from a Salesforce database table, filtered by field name(s). You can filter events by specifying a SQL query in the Filter Rule parameter. The filtered events are then converted to the specified output data format and written to the target S3 or ADLS destination. The default filter criteria allows all records to pass through.

The flow writes out a file every time its size has either reached 100 MB or five minutes have passed. Files can reach a maximum size of 1 GB. Failed S3 or ADLS write operations are retried automatically to handle transient issues. Define a KPI on the failure_WriteToS3/ADLS connection to monitor failed write operations.



Note: This ReadyFlow leverages Cloudera Public Cloud's centralized access control for cloud storage access. Make sure to either set up Ranger policies or an IDBroker mapping allowing your workload user access to the target S3 or ADLS location.

ReadyFlow details	
Source	Salesforce
Source Format	Salesforce
Destination	Cloudera managed Amazon S3 or ADLS
Destination Format	JSON, CSV, Avro

Prerequisites

Learn how to collect the information you need to deploy the Salesforce filter to S3/ADLS ReadyFlow, and meet other prerequisites.

For your data ingest source

- You have a Salesforce account. If you do not have one, you can sign up for a free developer account [here](#).
- You have your Salesforce username and password.
- You have your Salesforce domain name.
- You have data stored in Salesforce that you want to move to an object store.
- Your Salesforce user has the “API Enabled” permission.
- You have created a Salesforce connected app and [enabled OAuth Settings for API Integration](#).
- You have the Consumer Key and Secret from the connected app.
- You have reset your Salesforce security token.

For Cloudera DataFlow

- You have enabled Cloudera DataFlow for an environment.

For information on how to enable Cloudera DataFlow for an environment, see [Enabling Cloudera DataFlow for an Environment](#).

- You have created a Machine User to use as the Cloudera Workload User.

- You have given the Cloudera Workload User the EnvironmentUser role.
 - From the Management Console, go to the environment for which Cloudera DataFlow is enabled.
 - From the Actions drop down, click Manage Access.
 - Identify the user you want to use as a Workload User.

**Note:**

The Cloudera Workload User can be a machine user or your own user name. It is best practice to create a dedicated Machine user for this.


- Give that user EnvironmentUser role.
- You have synchronized your user to the Cloudera Public Cloud environment that you enabled for Cloudera DataFlow.

For information on how to synchronize your user to FreeIPA, see [Performing User Sync](#).

- You have granted your Cloudera user the DFCatalogAdmin and DFFlowAdmin roles to enable your user to add the ReadyFlow to the Catalog and deploy the flow definition.
 - Give a user permission to add the ReadyFlow to the Catalog.
 - From the Management Console, click User Management.
 - Enter the name of the user or group you wish to authorize in the Search field.
 - Select the user or group from the list that displays.
 - Click Roles Update Roles .
 - From Update Roles, select DFCatalogAdmin and click Update.



Note: If the ReadyFlow is already in the Catalog, then you can give your user just the DFCatalogViewer role.

- Give your user or group permission to deploy flow definitions.
 - From the Management Console, click Environments to display the Environment List page.
 - Select the environment to which you want your user or group to deploy flow definitions.
 - Click Actions Manage Access to display the Environment Access page.
 - Enter the name of your user or group you wish to authorize in the Search field.
 - Select your user or group and click Update Roles.
 - Select DFFlowAdmin from the list of roles.
 - Click Update Roles.
- Give your user or group access to the Project where the ReadyFlow will be deployed.
 - Go to DataFlow Projects .
 - Select the project where you want to manage access rights and click  More Manage Access .
- Start typing the name of the user or group you want to add and select them from the list.
- Select the Resource Roles you want to grant.
- Click Update Roles.
- Click Synchronize Users.

For your ADLS data ingest target

- You have your ADLS container and path into which you want to ingest data.

- You have performed one of the following to configure access to your ADLS folder:
 - You have configured access to the ADLS folders with a RAZ enabled environment.

It is a best practice to enable RAZ to control access to your object store folders. This allows you to use your Cloudera Public Cloud credentials to access ADLS folders, increases auditability, and makes object store data ingest workflows portable across cloud providers.

1. Ensure that Fine-grained access control is enabled for your Cloudera DataFlow environment.
2. From the Ranger UI, navigate to the ADLS repository.
3. Create a policy to govern access to the ADLS container and path used in your ingest workflow. For example: adls-to-adls-avro-ingest



Tip: The Path field must begin with a forward slash (/).

4. Add the machine user that you have created for your ingest workflow to ingest the policy you just created.

For more information, see *Ranger policies for RAZ-enabled Azure environment*.

- You have configured access to ADLS folders using ID Broker mapping.

If your environment is not RAZ-enabled, you can configure access to ADLS folders using ID Broker mapping.

1. Access IDBroker mappings.
 - a. To access IDBroker mappings in your environment, click **Actions Manage Access**.
 - b. Choose the IDBroker Mappings tab where you can provide mappings for users or groups and click **Edit**.
2. Add your Cloudera Workload User and the corresponding Azure role that provides write access to your folder in ADLS to the Current Mappings section by clicking the blue + sign.



Note: You can get the Azure Managed Identity Resource ID from the Azure Portal by navigating to **Managed Identities Your Managed Identity Properties Resource ID**. The selected Azure MSI role must have a trust policy allowing IDBroker to assume this role.

3. Click **Save and Sync**.

For your S3 data ingest target

- You have your source S3 path and bucket.

- You have configured access to S3 buckets:

- You have configured access to S3 buckets with a RAZ enabled environment.

It is a best practice to enable RAZ to control access to your object store buckets. This allows you to use your Cloudera credentials to access S3 buckets, increases auditability, and makes object store data ingest workflows portable across cloud providers.

1. Ensure that Fine-grained access control is enabled for your Cloudera DataFlow environment.
2. From the Ranger UI, navigate to the S3 repository.
3. Create a policy to govern access to the S3 bucket and path used in your ingest workflow.



Tip:

The Path field must begin with a forward slash (/).

4. Add the machine user that you have created for your ingest workflow to the policy you just created.

For more information, see *Creating Ranger policy to use in RAZ-enabled AWS environment*.

- You have configured access to S3 buckets using ID Broker mapping.

If your environment is not RAZ-enabled, you can configure access to S3 buckets using ID Broker mapping.

1. Access IDBroker mappings.
 - a. To access IDBroker mappings in your environment, click **Actions Manage Access**.
 - b. Choose the IDBroker Mappings tab where you can provide mappings for users or groups and click **Edit**.
2. Add your Cloudera Workload User and the corresponding AWS role that provides write access to your folder in your S3 bucket to the Current Mappings section by clicking the blue + sign.



Note: You can get the AWS IAM role ARN from the Roles Summary page in AWS and can copy it into the IDBroker role field. The selected AWS IAM role must have a trust policy allowing IDBroker to assume this role.

3. Click **Save and Sync**.

Related Concepts

[List of required configuration parameters for the Salesforce filter to S3/ADLS ReadyFlow](#)

List of required configuration parameters for the Salesforce filter to S3/ADLS ReadyFlow

When deploying the Salesforce filter to S3/ADLS ReadyFlow, you have to provide the following parameters. Use the information you collected in *Prerequisites*.

Table 1: Salesforce filter to S3/ADLS ReadyFlow configuration parameters

Parameter Name	Description
Age Field	Specify the name of a TIMESTAMP field that will be used to filter records using a bounded time window. The QuerySalesforceObject processor will return only those records with a timestamp value newer than the timestamp recorded after the last processor run.
CDP Workload User	Specify the Cloudera machine user or workload username that you want to use to authenticate to the object stores. Ensure this user has the appropriate access rights to the object store locations in Ranger or IDBroker.
CDP Workload User Password	Specify the password of the Cloudera machine user or workload user you are using to authenticate against the object stores (via IDBroker).
CSV Delimiter	If your source data is CSV, specify the delimiter here.

Parameter Name	Description
Data Output Format	Specify the desired format for your output data. You can use CSV, JSON or AVRO with this ReadyFlow.
Destination S3 or ADLS Path	Specify the name of the destination S3 or ADLS path you want to write to. Make sure that the path starts with "/".
Destination S3 or ADLS Storage Location	Specify the name of the destination S3 bucket or ADLS container you want to write to. <ul style="list-style-type: none"> For S3, enter a value in the form: s3a://[***Destination S3 Bucket***] For ADLS, enter a value in the form: abfs://[***Destination ADLS File System***]/[***Destination ADLS Storage Account***].dfs.core.windows.net
Filter Rule	Specify the filter rule expressed in SQL to filter events for the destination object store. Records matching the filter will be written to the destination object store. The default value forwards all records.
Salesforce Consumer Key	Specify your Salesforce consumer key.
Salesforce Consumer Secret	Specify your Salesforce consumer secret.
Salesforce Domain Name	Specify your Salesforce domain name.
Salesforce Field Names	Specify the field names requested from the sObject to be queried as a comma separated list.
Salesforce Password and Security Token	Specify your Salesforce password concatenated with your Salesforce security token.
Salesforce Username	Specify your Salesforce username.
Salesforce sObject Name	Specify the Salesforce sObject to be queried.

Related Concepts[Prerequisites](#)[Related Information](#)[Deploying a ReadyFlow](#)