

# Xactly Connect FAQs

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## Xactly Connect – Platform Overview and Top Use Cases

### Q. What is Xactly Connect?

**A.** Xactly Connect is an open, standards-based integration platform that gives organizations transparent data access and unmatched flexibility to manage and optimize their inbound and outbound compensation processes in Xactly Incent™. Using Xactly Connect, organizations can increase business efficiencies by automating and streamlining data flows into Xactly Incent and easily extracting compensation results for use in downstream systems, such as payroll, data warehouses, and other reporting applications.

Xactly Connect also provides a graphical web UI with an easy-to-use dashboard to give customers enhanced visibility to build and manage their data integration and automation processes.

### Q. How does Xactly Connect differ from other solutions?

**A.** Xactly Connect is a robust integration platform that has been *purpose-built* to improve and streamline how customer business systems and Xactly Incent work together. Using Xactly Connect, organizations gain value from the specialized capabilities of the Xactly Incent optimized data model. Xactly's optimized data model provides a long list of benefits to customers, including Xactly Insights, out-of-the-box reporting, and easy-to-use analytics. Xactly Connect also enables organizations to apply customizable business logic to data flows and use standardized automation processes specific to compensation.

Moreover, with its self-implementation option, Xactly Connect gives users full control over all of their data, including hosted SaaS applications. This ability provides tremendous value to their IT teams by giving them secure and on-demand access to their data on any desired platform.

### **Q. What skillset is needed to use Xactly Connect?**

**A.** Xactly Connect was built on ANSI SQL, one of the most common, standards-based database management languages. As a result, there's no need for IT teams to learn a new language in order to use the Xactly Connect platform, significantly reducing the amount of time required to get up and running. This approach is quite different from other solutions that use proprietary APIs or 3rd party integration tools, which can require extra learning time and effort. Xactly Connect also provides a complete set of REST APIs for easy management and visibility of your environment through your tool of choice.

### **Q. What implementation options are available with Xactly Connect?**

**A.** Xactly Connect gives customers unmatched flexibility to manage their SPM integration processes. Customers can choose to implement data integration processes in the way that works best for their particular organization. This can include:

- **Self-implementation** – through a customer's own internal IT department
- **Partner implementation** – using a third party systems integrator or implementation provider
- **Full service implementation** – using Xactly professional services
- **Hybrid implementation** – managing ongoing changes internally but using Xactly professional services for initial implementation, or other hybrid approaches

Whatever scenario a customer chooses, Xactly makes the data integration routines developed within the Xactly Connect platform fully accessible.

### **Q. How do customers commonly use Xactly Connect?**

**A.** A few examples of how customers use Xactly Connect include:

- Automatically load source system data, including sales transactions, HRMS, and currency exchange rates, into Xactly Incent
- Extract payroll files and other results from Xactly Incent and pull data into their own data warehouses for reporting and dashboards
- Leverage Xactly Connect REST APIs to pull real-time data from Xactly Incent into their own reporting dashboards
- Create their own custom integrations and processes that work with Xactly Incent through the Xactly Connect UI

With the ability to automatically pull multiple data sources together through Xactly Connect, customers, such as Cox Automotive, report that they have saved hundreds of hours per month.

## **Xactly Connect – Integration with Existing Systems**

### **Q. How do customers access Xactly Connect?**

**A.** There are three access mechanisms:

- **Web UI** - to monitor integration pipelines, as well as create, manage, and maintain data flows

- **ODBC/JDBC driver capabilities** – to provide streamlined API access to other enterprise systems that support ODBC/JDBC driver installation such as ETL, reporting, and visual SQL applications
- **REST API** – to write programs (using Java, Ruby, Python, etc.) to issue queries, launch ETL processes, check processing status, and other operations

**Q. What’s the benefit of using a REST API?**

**A.** Because its design is highly suitable to cloud-based system interactions, REST has become the standard open API used by web-based businesses. By delivering on open standards, Xactly Connect avoids the traditional pitfalls of tightly coupled and proprietary integrations. Additionally, REST APIs require less bandwidth and management than SOAP APIs. Many of Xactly’s partners also support REST APIs, including Salesforce.com and Workday.

Xactly’s unique approach of using ODBC/JDBC over REST extends the breadth of applications that can natively leverage the Xactly Connect data integration platform.

**Q. Does Xactly Connect integrate with my existing CRM, ERP, or HRMS systems?**

**A.** Yes. Xactly Connect was purposefully designed to easily and logically integrate within a customer’s existing infrastructure, including pre-built API integration with Workday and Salesforce, and ODBC/JDBC drivers that support *broad integration* platforms and techniques to integrate with virtually *any* CRM, ERP, or HCM system.

**Q. How does Xactly Connect integrate with Workday?**

**A.** Xactly Connect includes a Workday certified connector to support direct two-way integration to Workday data, including organizational, payroll feeds, and more. Developers can easily integrate this data into compensation management processes. Additionally, Xactly customers can integrate with Workday’s “Report-as-a-Service” functionality, reducing complexity and providing customers with more control over shared data.

**Q. How does Xactly Connect integrate with Salesforce?**

**A.** Xactly Connect includes pre-built application layer integration with Salesforce.com that allows for single sign-on; full access to all Salesforce.com Objects using direct data queries using Salesforce.com’s native SOQL statements; and Incentive Estimator for CRM and CPQ.

**Q. Why doesn’t Xactly Connect include pre-built ETL connectors?**

**A.** Because the Xactly ODBC/JDBC drivers can be plugged into any ETL system, there’s no fundamental need for a pre-built connector. Customers can use Xactly Connect with Netsuite, Informatica, Pervasive, and other ETL systems. Additionally, customers who don’t have an ETL tool can build ETL mappings and pipelines directly within Xactly Connect.

Customers have found that this approach ultimately gives them a higher degree of flexibility in managing their systems and data access. As opposed to using an OEM’ed or proprietary language and only allowing "connectors" to a limited number of applications, Xactly’s ODBC and JDBC drivers communicate through the REST API to simplify data integration using your platform and method of choice. Additionally, in circumstances where ODBC/JDBC are not practical, Xactly Connect can ingest and output customized data formats via the FTP server (in CSV format).

Further, there's no requirement for IT departments to learn proprietary APIs or third party ETL systems, saving time to get up and running.

## **Xactly Connect – Security; API vs. sFTP; Errors and Exceptions**

### **Q. How is the Xactly Connect API secured?**

**A.** Xactly Connect uses the same authentication mechanisms in the Xactly Incent application, giving users with "Xactly Connect API" role access to the platform. Additionally, Xactly Connect leverages industry-standard OAuth2 authentication to ensure secure access.

Xactly Connect also supports PGP encryption/decryption for data files placed on Xactly's SFTP server. The customer and Xactly can exchange public keys to facilitate encryption from the customer to Xactly's SFTP server. The platform's file encryption functions can also use the customer's public key to encrypt any system-created data extracts.

### **Q. How is Xactly Connect metered/throttled? If throttled, what are the parameters?**

**A.** Xactly Connect doesn't have the same restrictions found in most APIs. For example, most large cloud-based platforms limit the number of queries users can make during a 24-hour period. Xactly Connect doesn't have a usage-based limit; there's no throttling. While Xactly Connect does have practical limits in regards to the number of concurrent demands, they're very broad and can be adjusted as needed.

### **Q. When is it better to use API versus sFTP?**

**A.** In general, larger transaction files from legacy systems tend to be better suited for sFTP. However, when you're leveraging data in Salesforce.com or updating reference data, such as people and hierarchy data found in Workday, the API is usually preferable.

### **Q. Can you combine use of API and flat file with Xactly Connect?**

**A.** Yes. All methods of accessing Xactly Connect are simultaneously available and aware of each other.

### **Q. How does Xactly Connect manage exceptions and error checking?**

**A.** Xactly Connect provides final validation before data is loaded into Incent for commission calculation. Using exception tables, Xactly Connect can manage line items that don't pass validation. Clients can choose to move forward and calculate remaining items, ignoring exceptions; or hold process completion until exceptions are corrected. Additionally, Xactly Connect allows customers to also build in their own data validation procedures and tables.