Informatica

Informatica® Cloud Data Integration

NICE Satmetrix Connector

Informatica Cloud Data Integration NICE Satmetrix Connector
April 2024

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Preface

Use *NICE Satmetrix Connector* to learn how to read from or write to Satmetrix. Learn to create a NICE Satmetrix connection, develop and run synchronization tasks, mappings, and mapping tasks in Cloud Data Integration.

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CHAPTER 1

Introduction to NICE Satmetrix Connector

You can use NICE Satmetrix Connector to connect to Satmetrix from Data Integration.

Use NICE Satmetrix Connector to read data from Satmetrix and integrate data with other applications, databases, and flat files. You can also read data from Satmetrix or other applications, transform the data, and write data to Satmetrix. You can use NICE Satmetrix objects as sources and targets in synchronization tasks, mappings, and mapping tasks.

You can switch the mapping to advanced mode to include transformations and functions that enable advanced functionality.

NICE Satmetrix Connector supports the Satmetrix NPX PRO application version, Satmetrix API V1, and connections to Satmetrix API V1.

Note: This connector is developed by Informatica partners, third-party system integrators, or customers. You can look up the Product Availability Matrix or Informatica Marketplace for more information.

NICE Satmetrix Connector assets

Create assets in Data Integration to integrate data using NICE Satmetrix Connector.

When you use NICE Satmetrix Connector, you can include the following Data Integration assets:

- Mapping
- Mapping task
- Synchronization task

The following table lists the objects and task operations that NICE Satmetrix Connector supports:

Object	Read	Insert	Update	Upsert	Delete
Response	Yes	Yes	Yes	No	No
Contact Fields	Yes	No	Yes	No	No
Users	Yes	No	Yes	No	No
Survey	Yes	No	No	No	No

For more information about configuring assets and transformations, see *Mappings*, *Transformations*, and *Tasks* in the Data Integration documentation.

NICE Satmetrix Connector example

You want to send phone or email surveys to Microsoft Dynamics customers from Satmetrix.

You can use NICE Satmetrix Connector to perform the following synchronization or mapping tasks, which you configure on Data Integration:

Send Survey

Reads the information of the customer contacts that are nominated for the survey within Microsoft Dynamics. The task pushes this information to Satmetrix. Satmetrix then sends surveys to customers.

Update survey

Reads the invitation status and the response received from Satmetrix for the surveys sent using the Send Survey task. The information will be updated back into the corresponding custom survey object record in Microsoft Dynamics.

Create Case

Reads the action objects created in Satmetrix, and based on the rules defined by Satmetrix, the task creates corresponding mapping case objects in Microsoft Dynamics.

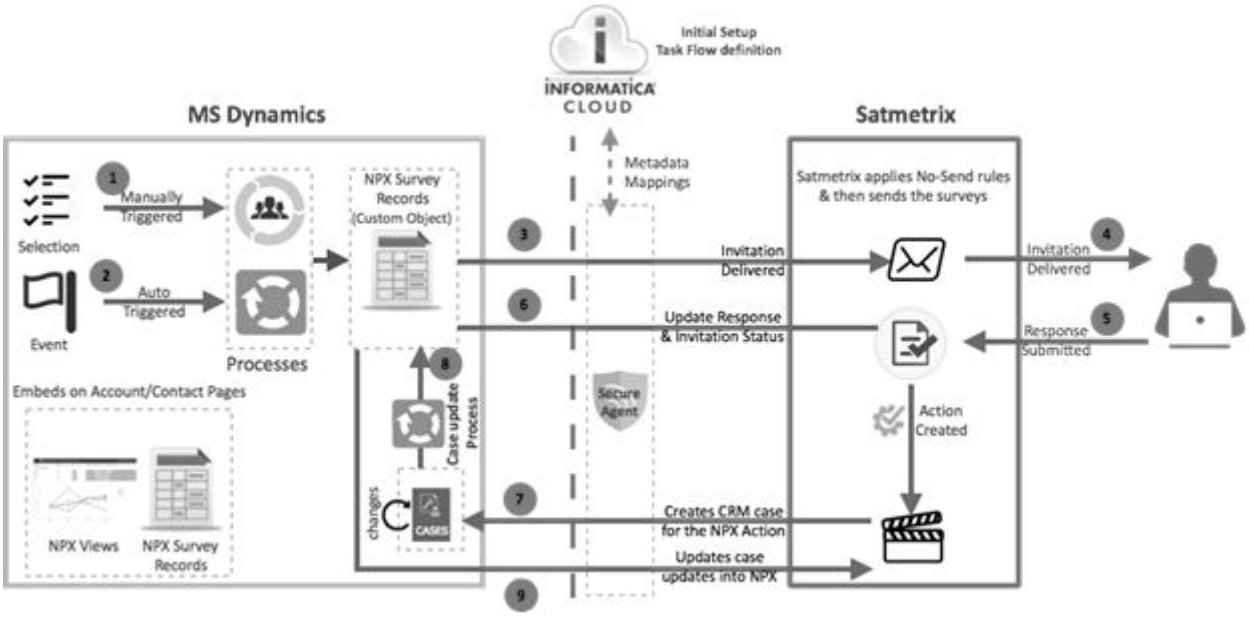
Note: The Create Case task creates mapping case objects in Microsoft Dynamics only for certain types of actions created in Satmetrix.

Update Satmetrix Actions

Reads the updates for action cases from Microsoft Dynamics and updates the corresponding action objects in Satmetrix.

Note: The Update Satmetrix Actions task updates custom follow-up fields, such as assignment and status, based on customer requirements.

The following image shows the Satmetrix tasks and workflow with Microsoft Dynamics that you can configure on Data Integration:



Administration of NICE Satmetrix Connector

As a user, you can use NICE Satmetrix Connector after the organization administrator performs the following tasks:

- Contact the Satmetrix Customer Success Manager to enable NICE Satmetrix Connector.
- Create a Satmetrix NPX user account with administrative privileges.
- Create an integration user account that you can use for NICE Satmetrix Connector.
- If password expiry policy is enabled on the Satmetrix NPX account, then contact the support team to disable the password expiry policy for the integration user account.

CHAPTER 2

NICE Satmetrix connections

Create a NICE Satmetrix connection to securely read data from or write data to Satmetrix.

You can use a NICE Satmetrix connection to specify sources and targets in synchronization task, mappings, and mapping tasks.

NICE Satmetrix connection properties

When you set up a NICE Satmetrix connection, you must configure the connection properties.

The following table describes the NICE Satmetrix connection properties:

Connection property	Description
Connection Name	Name of the NICE Satmetrix connection.
Description	Description of the connection. The description cannot exceed 765 characters.
Type	Type of connection. Select the NICE Satmetrix connection.
Runtime Environment	The name of the runtime environment where you want to run the tasks.
Satmetrix URL	The URL with which the Secure Agent connects to the Satmetrix APIs. The URL has the following format: *http://<company name>.satmetrix.com*
Username	Username of the Satmetrix integration user account.
Password	Password of the Satmetrix integration user account.

Configuring a NICE Satmetrix connection

You can configure a NICE Satmetrix connection on the Connections page in Administrator or in a wizard when you configure a mapping or task.

Perform the following steps to create NICE Satmetrix connection:

1. Perform either of the following steps:

- In Administrator, select **Connections**.
- In Data Integration, open a source or target in a mapping or task.

2. Click **New Connection**.
3. Specify the NICE Satmetrix connection properties.
4. To test the connection, click **Test Connection**.
5. Click **Save** to save the connection.

CHAPTER 3

Synchronization tasks with NICE Satmetrix Connector

Use the synchronization task to synchronize data between a source and target.

You can configure a synchronization task using the Synchronization Task wizard. When you create a task, you can associate it with a schedule to run it at specified times or on regular intervals. Or, you can run it manually. You can monitor tasks that are currently running in the activity monitor and view logs about completed tasks in the activity log.

NICE Satmetrix sources in synchronization tasks

You can use a NICE Satmetrix object as a single source in a synchronization task.

You configure NICE Satmetrix source properties on the **Source** page of the Synchronization Task wizard.

The following table describes the NICE Satmetrix source properties:

Property	Description
Connection	Name of the source connection.
Source Type	Select Single.
Source Object	Name of the source object. You can choose one of the following source objects when you read data from Satmetrix: **Contact Fields** Represents the contact information stored in Satmetrix. **Response** Represents response data of Satmetrix surveys. **Users** Represents the Satmetrix user information. **Survey** Represents the live survey data.

NICE Satmetrix source synchronization task example

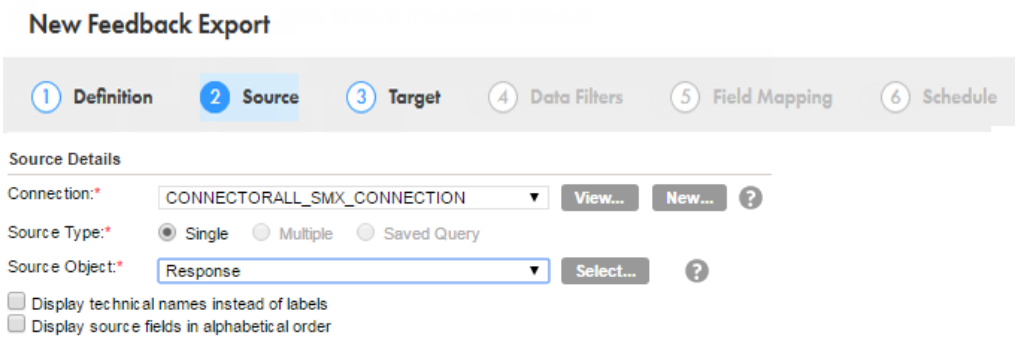
You want to export Satmetrix survey feedback into a `.csv` file. You want to create actionable reports externally by combining the survey feedback data set with other data from financial or operational sources.

You read the Satmetrix survey feedback by using Data Integration and write that data to a flat file.

Configure a synchronization task with the insert operation and configure the following objects:

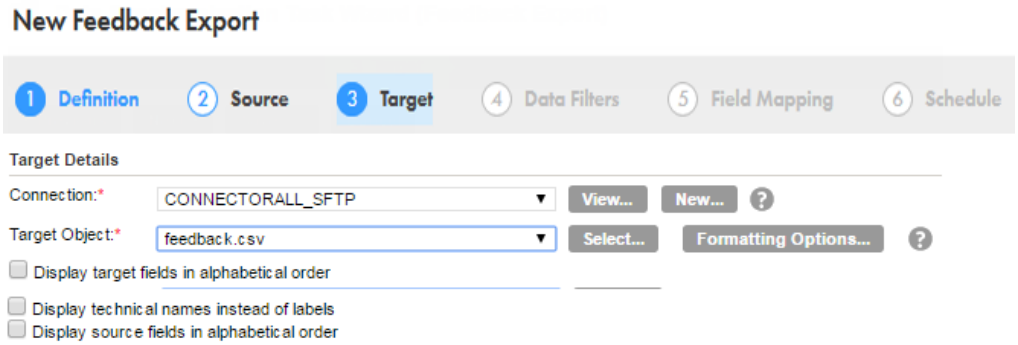
Source

The source object for a synchronization task is a Satmetrix Response. Use the NICE Satmetrix connection to connect to Satmetrix and read data from Satmetrix. The Response object is a single source in the synchronization task.



Target

Use the .csv file as the target object in the synchronization task. Use the Flat File connection to connect to the flat file.



Mapping

Map the primary fields of the Response source object to the flat file target object.

When you run the synchronization task, the Secure Agent writes the retrieved survey feedback to the target flat file.

NICE Satmetrix targets in synchronization tasks

When you run a 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 synchronization task. You configure NICE Satmetrix target properties on the **Target** page of the Synchronization Task wizard. Provide the name of the target connection and specify the target object to write data to Satmetrix.

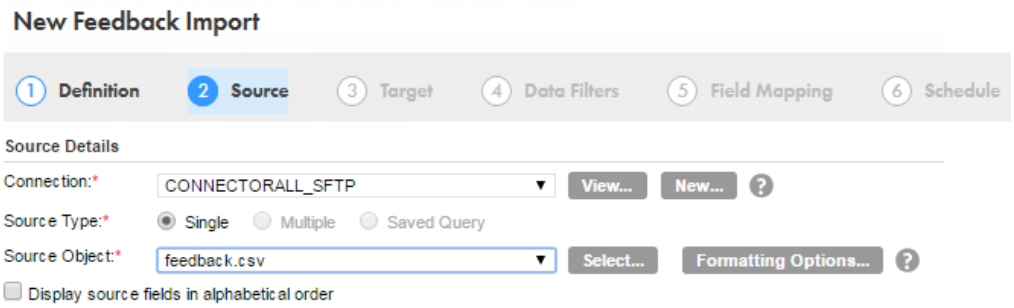
NICE Satmetrix target synchronization task example

You want to import feedback received from paper or phone survey that is stored in a **.csv** file to Satmetrix.

Configure a synchronization task with the insert operation and configure the following objects:

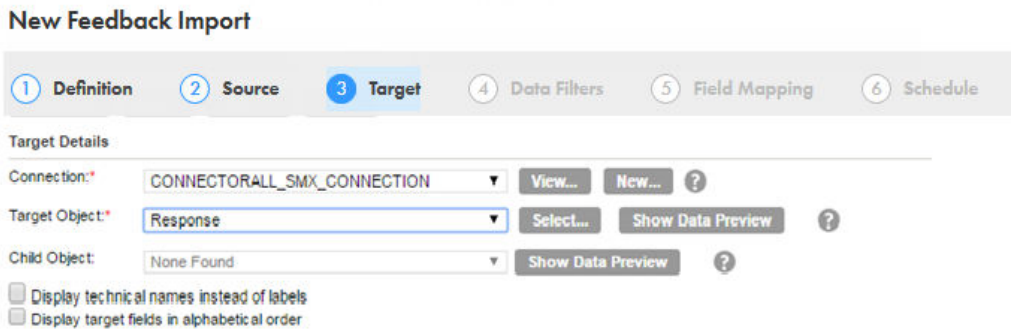
Source

The synchronization task includes a flat file source object that contains the survey feedback data. The source includes fields, such as name, last name, and email.



Target

The synchronization task includes a Response object. The target includes fields, such as name, primary score, and primary comment.



Field Mapping

Map the fields of the flat file source to the Satmetrix target.

When you run the synchronization task, the Secure Agent reads from the flat file source and writes to Satmetrix based on the fields you mapped.

CHAPTER 4

Mappings and mapping tasks with NICE Satmetrix Connector

When you configure a mapping, you describe the flow of data from the source to the target.

A mapping defines reusable data flow logic that you can use in mapping tasks.

When you create a mapping, you define the Source and Target transformations to represent a NICE Satmetrix object. Use the Mapping Designer in Data Integration to add the Source or Target transformations in the mapping canvas and configure the NICE Satmetrix source and target properties.
In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.
You can use Monitor to monitor the jobs.

NICE Satmetrix sources in mappings

In a mapping, you can configure a Source transformation to represent a NICE Satmetrix object as the source to read data from Satmetrix.

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

Property	Description
Connection	Name of the source connection.
Source Type	Type of the source object. You can use only a single object.
Object	Source object for the mapping
Filter	Apply filter conditions to filter the source data that you transfer to the target. You can specify only a simple filter condition.

The following table describes the advanced source properties:

Property	Description
Tracing Level	Detail level of error and status messages that Data Integration writes in the session log. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

NICE Satmetrix targets in mappings

In a mapping, you can configure a Target transformation to represent an NICE Satmetrix object as the target to write data to Satmetrix.

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

Property	Description
Connection	Name of the target connection.
Target Type	Type of the target object. You can use only a single object.
Object	Target object for the mapping.
Operation	The target operation. Select insert or update.

The following table describes the advanced target properties:

Property	Description
Satmetrix Status File	The path to the CSV file that shows the status of all the records written to the target. The file contains the record ID, the status of the record as successful or failed, and the reason for the failure.

CHAPTER 5

Data type reference

Data Integration uses the following data types in synchronization tasks with NICE Satmetrix Connector:

NICE Satmetrix native data types

NICE Satmetrix data types appear in the **Fields** tab for Source and Target transformations when you choose to edit metadata for the fields.

Transformation data types

Set of data types that appear in the remaining transformations. They are internal data types based on ANSI SQL-92 generic data types, which Data Integration uses to move data across platforms. Transformation data types appear in all remaining transformations in a synchronization task.

When Data Integration reads source data, it converts the native data types to the comparable transformation data types before transforming the data. When Data Integration writes to a target, it converts the transformation data types to the comparable native data types.

NICE Satmetrix and transformation data types

The following table lists the NICE Satmetrix data types that Data Integration supports and the corresponding transformation data types:

Satmetrix Data Type	Transformation Data Type	Description
TIMESTAMP	Date/Time	Jan 1, 0001 A.D. to Dec 31, 9999 A.D. (precision to nanosecond)
NUMBER	Integer	-2,147,483,648 to 2,147,483,647 Precision 10, scale 0
STRING	String	1 to 104,857,600 characters
DECIMAL	Double	Precision 15
DATE	Date/Time	Jan 1, 0001 A.D. to Dec 31, 9999 A.D. (precision to nanosecond)

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