Informatica®

Informatica® Cloud Data Integration

Satmetrix Connector

Informatica Cloud Data Integration Satmetrix Connector
April 2024

© Copyright Informatica LLC 2015, 2024

This software and documentation are provided only under a separate license agreement containing restrictions on use and disclosure. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC.

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation is subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License.

Informatica, the Informatica logo, Informatica Cloud, and PowerCenter are trademarks or registered trademarks of Informatica LLC in the United States and many jurisdictions throughout the world. A current list of Informatica trademarks is available on the web at https://www.informatica.com/trademarks.html. Other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties. Required third party notices are included with the product.

See patents at https://www.informatica.com/legal/patents.html.

DISCLAIMER: Informatica LLC provides this documentation "as is" without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of noninfringement, merchantability, or use for a particular purpose. Informatica LLC does not warrant that this software or documentation is error free. The information provided in this software or documentation may include technical inaccuracies or typographical errors. The information in this software and documentation is subject to change at any time without notice.

NOTICES

This Informatica product (the "Software") includes certain drivers (the "DataDirect Drivers") from DataDirect Technologies, an operating company of Progress Software Corporation ("DataDirect") which are subject to the following terms and conditions:

1. THE DATADIRECT DRIVERS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.
2. IN NO EVENT WILL DATADIRECT OR ITS THIRD PARTY SUPPLIERS BE LIABLE TO THE END-USER CUSTOMER FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR OTHER DAMAGES ARISING OUT OF THE USE OF THE ODBC DRIVERS, WHETHER OR NOT INFORMED OF THE POSSIBILITIES OF DAMAGES IN ADVANCE. THESE LIMITATIONS APPLY TO ALL CAUSES OF ACTION, INCLUDING, WITHOUT LIMITATION, BREACH OF CONTRACT, BREACH OF WARRANTY, NEGLIGENCE, STRICT LIABILITY, MISREPRESENTATION AND OTHER TORTS.

The information in this documentation is subject to change without notice. If you find any problems in this documentation, report them to us at infa_documentation@informatica.com.

Informatica products are warranted according to the terms and conditions of the agreements under which they are provided. INFORMATICA PROVIDES THE INFORMATION IN THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT.

Publication Date: 2024-04-08

Table of Contents

Preface 4

Informatica Resources 4

- Informatica Documentation 4
- Informatica Intelligent Cloud Services web site 4
- Informatica Intelligent Cloud Services Communities 4
- Informatica Intelligent Cloud Services Marketplace 4
- Data Integration connector documentation 5
- Informatica Knowledge Base 5
- Informatica Intelligent Cloud Services Trust Center 5
- Informatica Global Customer Support 5

Chapter 1: Introduction to Satmetrix Connector 6

Satmetrix Connector assets 6

Satmetrix Connector Example 7

Administration of Satmetrix Connector 8

Chapter 2: Satmetrix Connections 9

Satmetrix connection properties 9

Creating a Satmetrix Connection 9

Chapter 3: Synchronization Tasks with Satmetrix 11

Satmetrix Sources in Synchronization Tasks 11

- Satmetrix Source Synchronization Task Example 12

Satmetrix Targets in Synchronization Tasks 13

- Satmetrix Target Synchronization Example 13

Appendix A: Satmetrix Data Type Reference 14

Satmetrix and Transformation Data Types 14

Index 15

Preface

Use *Satmetrix Connector* to learn how to read from or write to Satmetrix by using Cloud Data Integration. Learn to create a Satmetrix connection and run synchronization tasks in Cloud Data Integration.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit https://docs.informatica.com.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

Informatica Intelligent Cloud Services web site

You can access the Informatica Intelligent Cloud Services web site at http://www.informatica.com/cloud. This site contains information about Informatica Cloud integration services.

Informatica Intelligent Cloud Services Communities

Use the Informatica Intelligent Cloud Services Community to discuss and resolve technical issues. You can also find technical tips, documentation updates, and answers to frequently asked questions.

Access the Informatica Intelligent Cloud Services Community at:

https://network.informatica.com/community/informatica-network/products/cloud-integration

Developers can learn more and share tips at the Cloud Developer community:

https://network.informatica.com/community/informatica-network/products/cloud-integration/cloud-developers

Informatica Intelligent Cloud Services Marketplace

Visit the Informatica Marketplace to try and buy Data Integration Connectors, templates, and mapplets:

https://marketplace.informatica.com/

Data Integration connector documentation

You can access documentation for Data Integration Connectors at the Documentation Portal. To explore the Documentation Portal, visit https://docs.informatica.com.

Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit https://search.informatica.com. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Intelligent Cloud Services Trust Center

The Informatica Intelligent Cloud Services Trust Center provides information about Informatica security policies and real-time system availability.

You can access the trust center at https://www.informatica.com/trust-center.html.

Subscribe to the Informatica Intelligent Cloud Services Trust Center to receive upgrade, maintenance, and incident notifications. The Informatica Intelligent Cloud Services Status page displays the production status of all the Informatica cloud products. All maintenance updates are posted to this page, and during an outage, it will have the most current information. To ensure you are notified of updates and outages, you can subscribe to receive updates for a single component or all Informatica Intelligent Cloud Services components. Subscribing to all components is the best way to be certain you never miss an update.

To subscribe, on the Informatica Intelligent Cloud Services Status page, click **SUBSCRIBE TO UPDATES**. You can choose to receive notifications sent as emails, SMS text messages, webhooks, RSS feeds, or any combination of the four.

Informatica Global Customer Support

You can contact a Global Support Center through the Informatica Network or by telephone.

To find online support resources on the Informatica Network, click **Contact Support** in the Informatica Intelligent Cloud Services Help menu to go to the **Cloud Support** page. The **Cloud Support** page includes system status information and community discussions. Log in to Informatica Network and click **Need Help** to find additional resources and to contact Informatica Global Customer Support through email.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at https://www.informatica.com/services-and-training/support-services/contact-us.html.

CHAPTER 1

Introduction to Satmetrix Connector

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

Use 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 Satmetrix objects as sources and targets in synchronization tasks.

Satmetrix Connector supports the Satmetrix NPX PRO application version.

Satmetrix Connector supports 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.

Satmetrix Connector assets

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

When you use Satmetrix Connector, you can create a synchronization task to read data from or write data to Satmetrix.

The following table lists the objects and task operations that 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 *Transformations* and *Tasks* in the Data Integration documentation.

Satmetrix Connector Example

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

You can use 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.

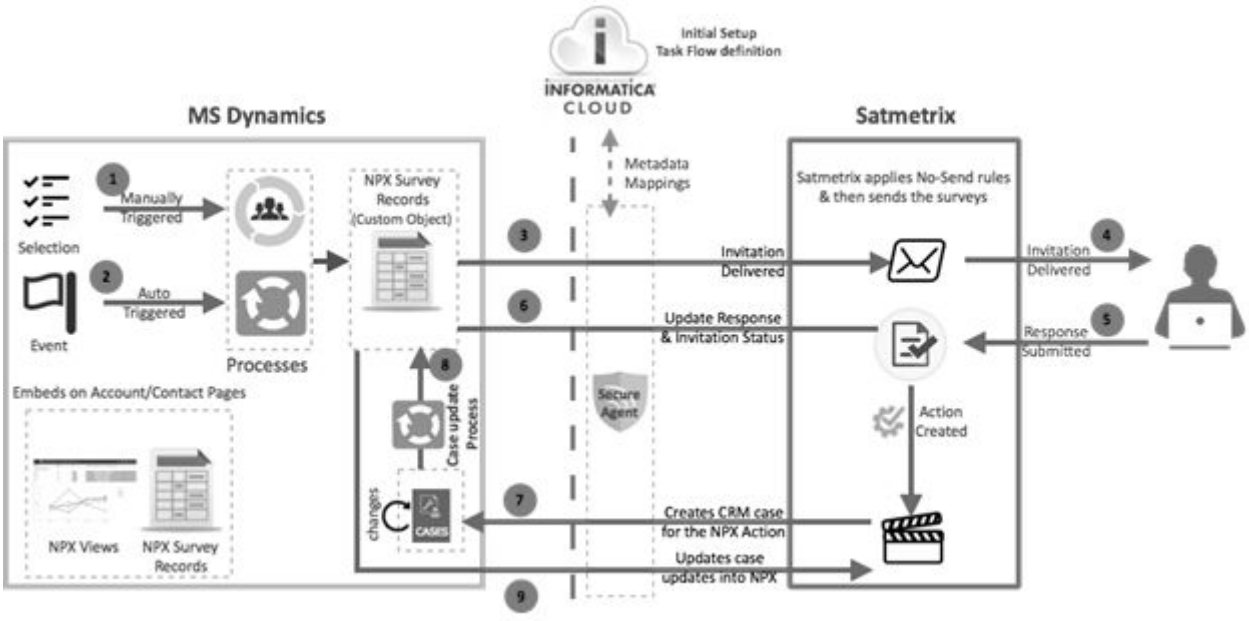
Note: The Create Case task creates mapping case objects in Microsoft Dynamics only for certain types of actions created in Satmetrix.

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 Satmetrix Connector

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

- Contact the Satmetrix Customer Success Manager to enable Satmetrix Connector.
- Create a Satmetrix NPX user account with administrative privileges.
- Create an integration user account that you can use for 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

Satmetrix Connections

You create a Satmetrix connection on the Connections page. Use the connection when you create a synchronization task or a mapping task.

Create a Satmetrix connection to connect to Satmetrix so that the Secure Agent can read data from and write data to Satmetrix. You can specify the Satmetrix source and target in synchronization tasks.

Satmetrix connection properties

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

The following table describes the Satmetrix connection properties:

Connection property	Description
Connection Name	Name of the Satmetrix connection.
Description	Description of the connection. The description cannot exceed 765 characters.
Type	Type of connection. Select the 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.

Creating a Satmetrix Connection

To use Satmetrix Connector in a synchronization task, you must fist create a connection.

You can configure a connection on the Connections page or in a wizard as you configure a task.

Perform the following steps to create Satmetrix connection:

1. On the **Connections** page, click **New Connection** to create a connection.

   The **New Connection** page appears.
2. Specify the Satmetrix connection properties.
3. Click **Save** to save the connection.

CHAPTER 3

Synchronization Tasks with Satmetrix

Use a 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.

Satmetrix Sources in Synchronization Tasks

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

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

The following table describes the 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.

Satmetrix Source Synchronization Task Example

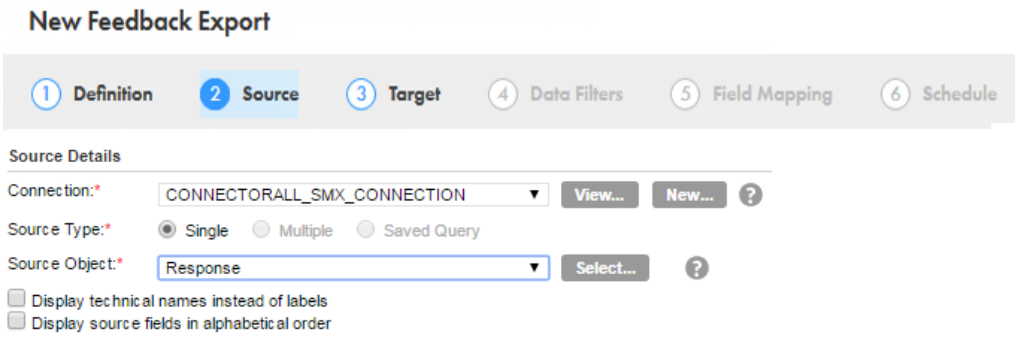
You want to export Satmetrix survey feedback into a `.csv` file. You want to create actionable reports externally by combining the survey feedback data set with other data from financial or operational sources.

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:

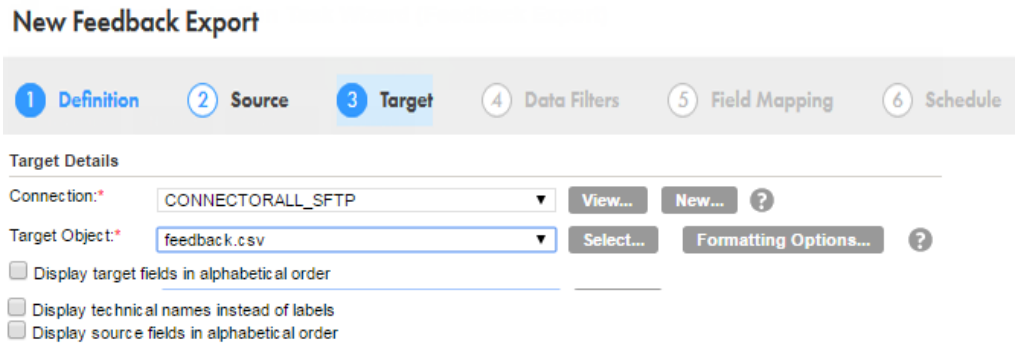
Source

The source object for a synchronization task is a Satmetrix Response. Use the 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.

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 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.

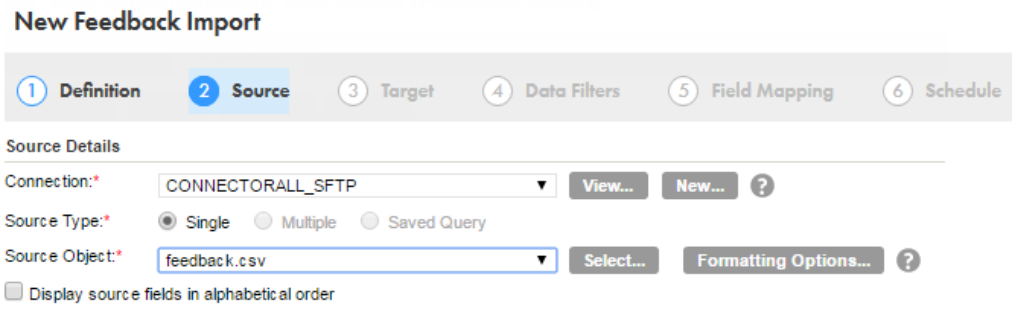
Satmetrix Target Synchronization Example

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:

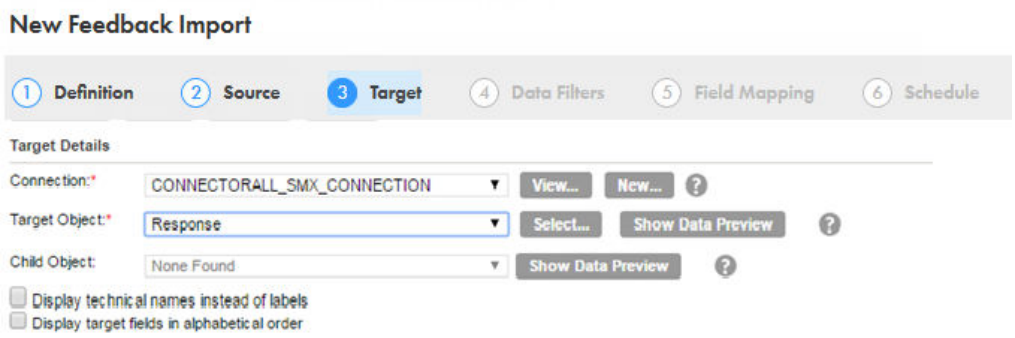
Source

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.



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.

APPENDIX A

Satmetrix Data Type Reference

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

Satmetrix native data types

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.

Satmetrix and Transformation Data Types

The following table lists the 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)

INDEX

A

administration 8

C

Cloud Application Integration community
  URL 4
Cloud Developer community
  URL 4
connections
  Satmetrix 9
creating a connection 9

D

Data Integration community
  URL 4
data types
  Satmetrix 14

I

Informatica Global Customer Support
  contact information 5
Informatica Intelligent Cloud Services
  web site 4

M

maintenance outages 5

S

Satmetrix
  assets 6
  connection properties 9
  connections 9
  data types 14
  overview 6
status
  Informatica Intelligent Cloud Services 5
Synchronization task 11
synchronization tasks
  Satmetrix source example 12
  Satmetrix target example 13
  source properties 11
  targets 13
system status 5

T

trust site
  description 5

U

upgrade notifications 5

W

web site 4