Adobe Analytics Integration

Overview

This document outlines solutions and recommended approaches to exchange data between your web properties, Medallia and Adobe Analytics.

When a customer goes on a website his behavior, click-path and available info are tracked on the property and sent to Adobe Analytics to generate reports/alerts on conversion, user journey and funnel analysis. Historically, Adobe has only been able to collect what the user does online, not what the user thinks and feels. An integration with Medallia provides the Marketing organization with the customer voice associated with that digital property to optimize and personalize the digital experience in real-time as well as enrich Adobe Analytics with customer signals, topics and sentiment to comprehensively understand customer profiles and journeys.

High-level flow diagram
On-site integration

All digital experience starts with a customer visiting a digital property. This session is usually tracked by Adobe and can now be enriched with Medallia data.

Important

Not all data is exposed to the property or available in real-time thus a back-end integration can be required depending on what data needs to be sent to Analytics.

<table>
<thead>
<tr>
<th></th>
<th>On-site integration</th>
<th>Backend Integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metadata (e.g. Feedback uuid, Form type, etc.)</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Scale questions</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Non-scale questions</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Verbatims/raw comments</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Text Analytics data</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Calculated data</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Solution design

Adobe Launch (Recommended)

Medallia offers an extension on the Launch catalog to deploy Medallia Digital quickly and seamlessly on your web properties. The extension also allows you to detect survey events, capture customer feedback in real-time through Data elements, use it in rules to personalize your customer’s experience and share data with Adobe Analytics.

With this method the effort required is significantly reduced and does not need any code to be changed or added directly to your property.
See [step-by-step section (A)](link) to implement on-site integration through Adobe Launch.

**Medallia Digital - Custom integration**

If you do not wish to use Adobe Launch, you can deploy Medallia Digital through your other tag manager of choice or add Medallia’s embed code directly to your property.

Survey events can be detected through a Medallia Digital Custom Event integration which also lets you fetch customer answers and metadata. Please refer to the Custom Event integration documentation to learn more about events and data available.

Custom code will be required on your property to share the fetched data with Adobe Analytics.

**Limitations**

- Events are detected in real-time on the property but data will only show in reporting when Adobe Analytics has finished processing it. The duration can vary depending on what method is used as well as a large range of other factors.
- Only high level fields can be set easily (i.e. eVars, Props, List vars and Events). This makes “real-time” tracking of scores either very resource intensive (i.e. one field per question) or reliant on parsing rules (i.e. data concatenated into one field with a parsing rule to redistribute values in “sub-fields” in Analytics). In that sense backend integration is more efficient to send survey data when real-time actions are not required. Only the UUIDs are required for the on-site integration.
- To mitigate a sometimes challenging support of “0” values in Adobe, when a customer selects “0” the value is transformed into “zero” for Adobe Launch and Analytics.
Medallia to Adobe Analytics

Data model

As variables in Adobe Analytics tend to be a scarce resource, Medallia represents by default a survey response in Analytics using a single Conversion variable (i.e. eVar) and stores each related data as “metadata” called Classifications.

By default the parent value (at the eVar level) and joining key should be the Feedback UUID but other IDs can be considered depending on use case (e.g. Session ID). Records are then enriched on a daily basis using this value to populate the Classifications nested inside.

Below is the full list of options available to store data in Adobe Analytics. The perfect design depends on your exact needs. Medallia’s recommendation is to keep it as simple as possible.

- **Medallia Survey (required):** Key is the UUID set by the On-site integration, the rest enriched later via backend integration.
  - Example of eVar value: “cbde-3eb4-7be7-7ac2-a8a5-40c4-a2b2-bf33”
  - Pro: Most use cases do not require survey data to flow in real-time in Analytics. Batching offers a more efficient solution. Set of data available is broader.
  - Con: Cannot be used to immediately detect an emerging issue take action on-side in real-time.

- **Tracked key metrics (optional):** Key and data concatenated and set by On-site integration. Rely on a parsing rule to populate classification.
○ Example of eVar value with one key scale question answer for Overall Satisfaction e.g. osat score of 9:
    “luuid:cbde-3eb4-7be7-7ac2-a8a5-40c4-a2b2-bf33|osat:9”
○ Pro: Only way to help Digital marketer to detect issues with the website swiftly.
○ Con: Dataset available on site is limited. Limitations in how Classifications can be set in Analytics forces us to use parsing rules which creates extra complexity, client effort and requires maintenance. Only use if critical for you.

● One conversion variable per key metric (not recommended): Expensive design in terms of eVars used. Not recommended except if true real-time is a must.
  ○ Example of eVar value: “9”

Solution design
On a daily basis, Medallia batches responses and enriches records using Adobe’s Classifications API. Once Adobe has finished processing the update it generates a SAINT report. Let your Medallia team know if you want to receive that report and provide the email address it should be delivered to.

Authentication
Adobe recommends to use JWT to authenticate request to its Classifications API. Use Adobe.io to allow Medallia to access the relevant endpoints.

Please refer to the step-by-step section (B) to add an integration in Adobe.io.

Adobe Analytics limitations
- No limit in the number of calls that can be made.
- Max of 25,000 records per import job via the Classifications API. Medallia will spread across multiple jobs if required.
- Max of 500,000 unique values available for reporting per eVar per month. Anything above will be available in Adobe’s data warehouse but ignored in reporting.
- Max of 30 classifications per eVar. Focus on key metrics only or spread across multiple eVars as needed.
- Every fields in Analytics have a max number of characters of 255. Anything above is truncated.
Adobe Analytics to Medallia

Solution design

Medallia can also enrich its own records by importing segments or data collected by Adobe Analytics (or indirectly from Target/Audience Manager). The recommended approach is for your Adobe admin to create a daily Data warehouse report (see step-by-step section (C)) and let Medallia's SFTP feed and importer do the rest.
Step-by-step

A - Implement on-site integration through Adobe Launch

Deploy Medallia Digital quickly and seamlessly on your web properties. The extension also allows you to detect survey events, capture customer feedback in real-time through Data elements, use it in rules to personalize your customer’s experience and share data with Adobe Analytics.

Install the Medallia for Adobe Launch extension

In the Adobe Launch console, select **Extensions** to access the **Catalog**. Look for the extension called **Medallia for Adobe Launch** and click on **Install**.
Once the extension is installed, the following elements are available in Launch:

- **Actions**
  - Load Medallia Digital

- **Events**
  - Button Clicked
  - Capture Button Cancel
  - Capture Button Clicked
  - Capture Button Taken
  - Form Back Page
  - Form Displayed
  - Form Next Page
  - Invite Accepted
  - Invite Declined
  - Invite Displayed
  - Invite Skipped
  - ShowForm Called
  - Survey Abandoned
  - Survey Completed
  - Thank You Closed
  - Thank You Displayed

- **Data Elements**
  - Event Name
  - Feedback UUID
  - Form Id
  - Form Type
  - Scale questions
Deploy Medallia Digital code on web property

In the Launch console click on Rules then Create New Rule and name the new rule accordingly.

Set the Event based on what is the most relevant for your needs (DOM Ready is recommended)
In the **Actions** section, select **Medallia for Adobe Launch** as the extension then pick **Load Medallia Digital** as the Action Type.

Simply follow the instructions on the screen to find and paste the embed url needed.

**Save** that rule and make sure to **publish** it.

Medallia Digital is now deployed on your web property when a page loads.
Detect Medallia Digital events and capture data in real-time

The extension helps trigger rules on Medallia Digital Events and includes pre-built Data element types to make form metadata or customer feedback available to run logic and personalize the user experience in real-time or impact future visits.

To set such rules, simply go to Rules and Create New rule. After naming it, click to set an Event and select Medallia for Adobe Launch as the Event type.

Pick in the list what event should be the trigger.

Define conditions if relevant and indicate what action should be run. This could range from setting cookies to changing next page seen or sending data to another system (like Adobe Analytics).

Create new Data Elements based on the pre-built Data Element types to capture Medallia Digital event data in real-time.
Push data to Adobe Analytics

Install Extension

Make sure to follow the steps above to detect and collect data before being able to send it. Then install the Adobe Analytics extension in your instance.

In the installation screen pick your reporting suites for Development, Staging and Production.

Sending data is then done in two steps, first setting the variables then by sending a beacon. You can also set non-Medallia related fields when setting the variables to limit the number of calls made to Adobe.

1. **(Required) Setting variables - Send UUID to enable Backend integration**

   ![](image)

   Action Configuration

   variables

   The extension will not send a beacon; it only sets the variables. In order to send the data to Adobe Analytics, you need to add the "send beacon" action from the Adobe Analytics extension to a rule.

   - Variable: `uuid`
   - Set as: `no`
   - Tracking: `s.97`

2. **(Required) Sending a beacon**

   ![](image)

   Action Configuration

   - Extension: Adobe Analytics
   - Action Type: Send Beacon
   - Name: Adobe Analytics - Send Beacon
   - Tracking:
     - s.97: Send data to Adobe Analytics and treat it as a page view
     - s.97: Send data to Adobe Analytics and do not treat it as a page view
3. (Optional) Setting variables - Send scores from Launch directly

Create a second eVar in Adobe Analytics to receive concatenated values.

In Adobe Launch set the eVar value with the following pattern to allow for a simpler and easier to maintain set of classification rules later on:

```
eVar5 Set as [id:%uuid%]osat:%osat%]
```

%uuid% and %osat% are the data elements created and tracked in Launch thanks to Medallia extension.

Finally create a set parsing rules in Adobe Analytics to classify each answer accordingly.

<table>
<thead>
<tr>
<th>Matching Condition</th>
<th>Classification Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Expression</td>
<td>Feedback UUID</td>
</tr>
<tr>
<td>Regular Expression</td>
<td>Tracked Overall Satisfaction</td>
</tr>
</tbody>
</table>
B - Add an Integration in Adobe.io

Switch to the Adobe I/O Console (https://console.adobe.io) and click View Integrations and then click New Integration.

Set the integration to Access an API and click Continue.

From the services list, under the Experience Cloud section, click Adobe Analytics followed by Service Account integration. Click Continue when ready.
Set all the integration details on the next screen. Upload the public key certificate provided by Medallia. Select the profile that was configured in the last section. Click **Create integration** when ready.
Create a new integration

Integration Details

Name

Example Integration

6 to 25 characters

Description

This is an example integration for connecting [Medallia] and Adobe Analytics.

6 to 1000 characters

Public keys certificates ●

Drag and drop your file or

Select a File from your computer

You can add 1 more file(s)

Certificates

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>certificate_pub.crt</td>
<td>0.001 MB</td>
<td>Remove</td>
</tr>
</tbody>
</table>

Adobe Analytics Configuration

Select one or more product profiles for Adobe Analytics

Product profiles grant granular access to a group of features of the service you’ve selected in the previous steps.

<table>
<thead>
<tr>
<th>PRODUCT PROFILE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics - Exchange Partner Medallia</td>
<td>Default configuration for Analytics</td>
</tr>
<tr>
<td>All Access</td>
<td>Medallia Integration</td>
</tr>
</tbody>
</table>

Cancel

Create integration
The integration should now be created. Click **Continue to integration details** to proceed.

---

**Share the Integration Details**

Send to Medallia all of the following details about the integration:

- API Key (Client ID)
- Technical account ID
- Technical account email
- Organization ID
- Client secret
- JWT payload

These details can be found on the **Overview** and **JWT** tabs.
C - Configure a daily Data warehouse report for session-level data

Open the Data warehouse panel

Set a daily schedule for records from yesterday

Data Warehouse
Add all the dimensions and metrics to be exported to Medallia

**Data Warehouse**

<table>
<thead>
<tr>
<th>Items</th>
<th>Report Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakdowns</td>
<td>![Data Warehouse Table]</td>
</tr>
<tr>
<td>Metrics</td>
<td>![Data Warehouse Table]</td>
</tr>
</tbody>
</table>

Breakdowns includes all standard dimensions, eVars, props and Events. Metrics cover standard metrics like Carts and Checkouts as well as any custom calculated metrics created. **Make sure to include the “Medallia Survey” eVar.**

Open the delivery option panel

**Schedule Delivery**

Email Report *(Advanced Delivery Options)*

Send To:
Set the file to be a *.zip exported via FTP

Finally, set schedule to be at 3am everyday
How to create a report for aggregated metrics
Configure a new report as above but do not include a split on the Medallia Survey eVar. When you add the metrics only daily aggregations will be added in the file.
Data Warehouse

**Data Warehouse Request**

**Request Name:**

**Reporting Date**

Select either a custom or preset date range. The preset range is relative to the date the report is generated. Also choose the level of granularity desired for the report.

- Custom: 11/11/19 to 11/11/19
- Preset: Yesterday

**Granularity:** Daily

---

**Data Warehouse**

**Items**

- **Breakdowns**
  - Standard
  - Custom
  - Segments
    - Search Breakdowns
    - Browser Heights
    - Browsers
    - Browser Types
    - Browser Widths
    - Categories

- **Metrics**
  - Standard
  - Custom
    - Search Metrics
    - Product Views (Participation)
    - Revenue
    - Revenue (Participation)

**Report Preview**

- **Site:** Medallia demo
- **Date:** 11/11/19 - 11/11/19
- **Segment:** None

<table>
<thead>
<tr>
<th>Date</th>
<th>Carts</th>
<th>Cart Views</th>
<th>Checkouts</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>XXXXXX</td>
<td>XXXXXX</td>
<td>XXXXXX</td>
<td>XXXXXX</td>
</tr>
<tr>
<td>Day</td>
<td>XXXXXX</td>
<td>XXXXXX</td>
<td>XXXXXX</td>
<td>XXXXXX</td>
</tr>
</tbody>
</table>