



# Data Integration User Manual

## -Survey Generator Integration-



### Revision history

Version	Date	Revision Description
1.0	01/24/2017	Initial version
1.1	03/05/2018	Document modified for new UI



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## Overview

### Scope

This document is a user manual for Survey Generator Data Integration. It contains all relevant information for this integration that has been added into the Dapresy system.

### Purpose

The purpose of this document is to provide an overview of Survey Generator Data Integration and how to use it in the Dapresy system.

## Getting Started

### Integration Overview

This API allows you to export survey data from Survey Generator (<https://alstra.se>) directly into Dapresy to be used as a data source.

### Pre-Requirements

In order to use this Survey Generator Data Integration, you will need to have an account on Survey Generator. This will allow you to get the *API security credentials*. In order to ensure a successful export from Survey Generator, the following credentials are necessary:

1. Username (user that is authorized to export from Survey Generator)
2. Password
3. API Username
4. API Password
5. Company ID
6. Survey ID

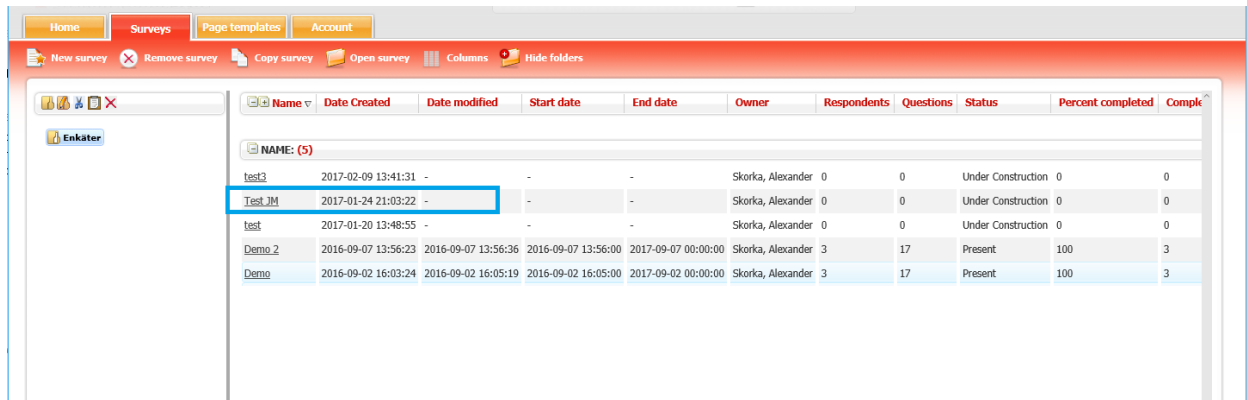
These are mandatory for proper integration into Dapresy.

### How to get security credentials from Survey Generator

Follow these easy steps to get credentials from the Survey Generator API:

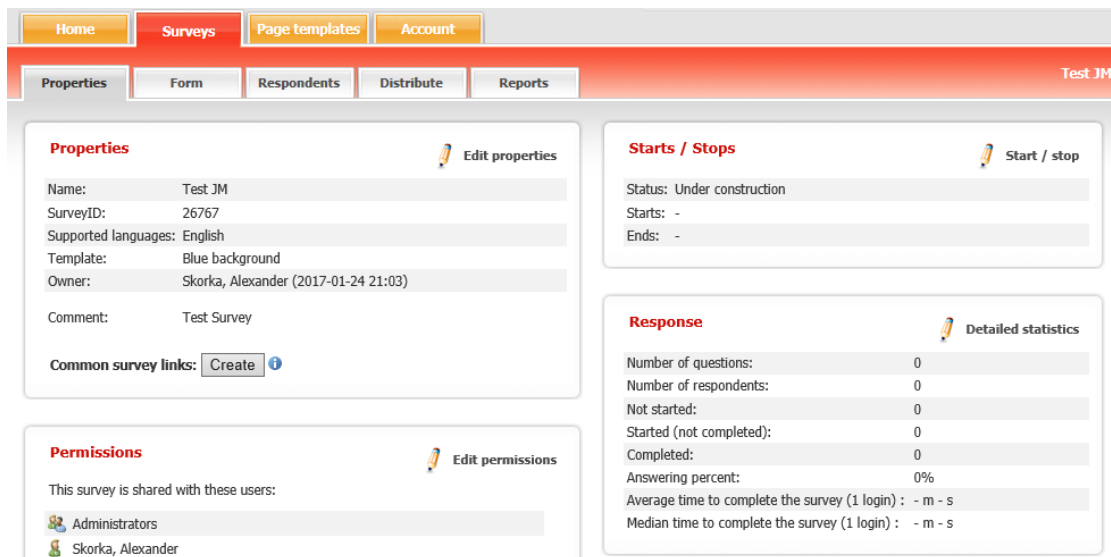
1. Log into Survey Generator developers portal <https://alstra.se> with your Survey Generator credentials
2. Go to **Surveys** tab

3. Select the survey that needs to be exported



Name	Date Created	Date modified	Start date	End date	Owner	Respondents	Questions	Status	Percent completed	Comple
test3	2017-02-09 13:41:31	-	-	-	Skorka, Alexander	0	0	Under Construction	0	0
Test JM	2017-01-24 21:03:22	-	-	-	Skorka, Alexander	0	0	Under Construction	0	0
test	2017-01-20 13:48:55	-	-	-	Skorka, Alexander	0	0	Under Construction	0	0
Demo 2	2016-09-07 13:56:23	2016-09-07 13:56:36	2016-09-07 13:56:00	2017-09-07 00:00:00	Skorka, Alexander	3	17	Present	100	3
Demo	2016-09-02 16:03:24	2016-09-02 16:05:19	2016-09-02 16:05:00	2017-09-02 00:00:00	Skorka, Alexander	3	17	Present	100	3

4. Select **Properties** tab



**Properties** | Form | Respondents | Distribute | Reports | Test JM

**Properties** Edit properties

Name: Test JM  
 SurveyID: 26767  
 Supported languages: English  
 Template: Blue background  
 Owner: Skorka, Alexander (2017-01-24 21:03)  
 Comment: Test Survey  
 Common survey links: [Create](#)

**Starts / Stops** Start / stop

Status: Under construction  
 Starts: -  
 Ends: -

**Response** Detailed statistics

Number of questions: 0  
 Number of respondents: 0  
 Not started: 0  
 Started (not completed): 0  
 Completed: 0  
 Answering percent: 0%  
 Average time to complete the survey (1 login) : - m - s  
 Median time to complete the survey (1 login) : - m - s

**Permissions** Edit permissions

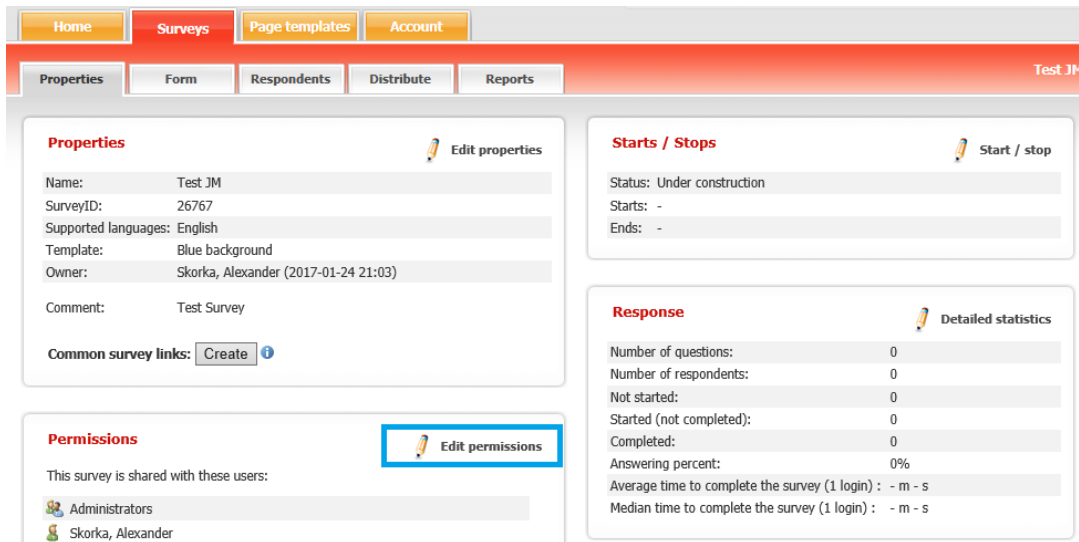
This survey is shared with these users:

- Administrators
- Skorka, Alexander

5. **SurveyID** is in the list of properties (it will be needed in the Dapresy import page)

6. Go to **Permissions**

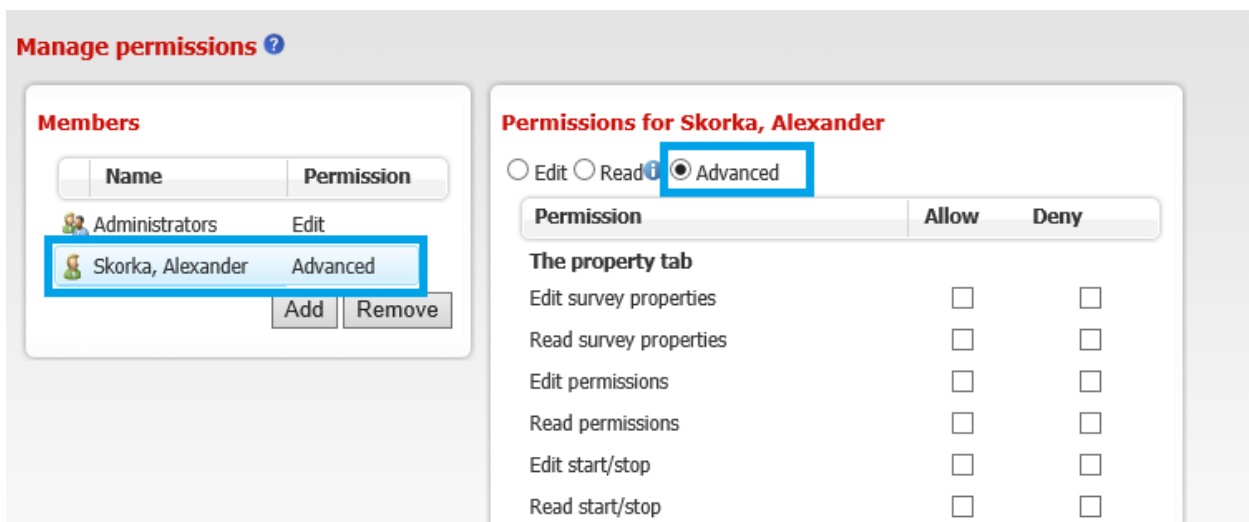
## 7. Choose **Edit permissions**



The screenshot shows the 'Test JM' survey management page. The 'Permissions' section is active, and the 'Edit permissions' button is highlighted with a blue box. The 'Properties' section shows survey details like Name (Test JM), SurveyID (26767), and Owner (Skorka, Alexander). The 'Starts / Stops' section shows the status as 'Under construction'. The 'Response' section shows 0 questions and 0 respondents.

8. In the **Manage permissions**, window select which user will be used for the survey export

9. Select **Advanced**



The 'Manage permissions' window is shown. In the 'Members' list, 'Skorka, Alexander' is selected. In the 'Permissions for Skorka, Alexander' section, the 'Advanced' radio button is selected. Below, a table lists permissions with 'Allow' and 'Deny' checkboxes.

Permission	Allow	Deny
<b>The property tab</b>		
Edit survey properties	<input type="checkbox"/>	<input type="checkbox"/>
Read survey properties	<input type="checkbox"/>	<input type="checkbox"/>
Edit permissions	<input type="checkbox"/>	<input type="checkbox"/>
Read permissions	<input type="checkbox"/>	<input type="checkbox"/>
Edit start/stop	<input type="checkbox"/>	<input type="checkbox"/>
Read start/stop	<input type="checkbox"/>	<input type="checkbox"/>

10. In the permission list, enable the **Webservice permissions**

<b>Webservice permissions</b>		
Create report through webservises	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read respondents through webservises	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Other permissions</b>		

By following these steps, users that have been selected can export survey data to Dapresy. In order to get the API Username, API Password, and Company ID, you will need to contact Survey Generator support to provide these credentials.

For the integration with Survey Generator, you will need:

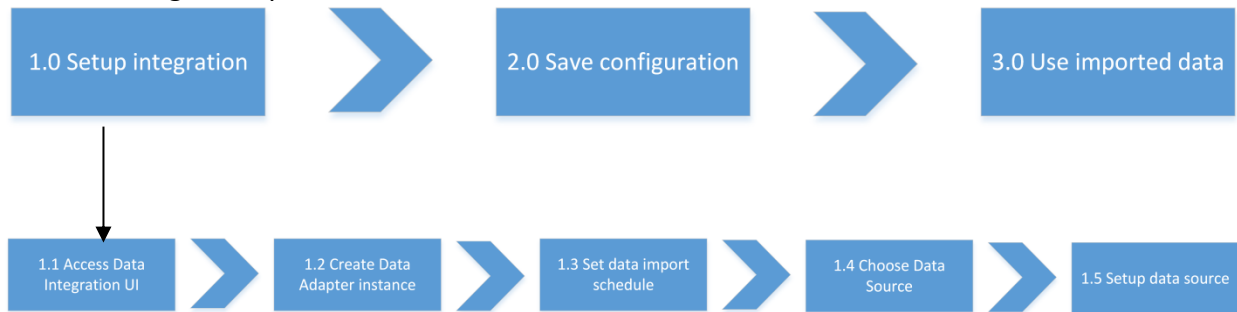
1. Username (user that is authorized to export from Survey Generator)
2. Password (password of the user that is selected for export)
3. API Username (get from Survey Generator support)
4. API Password (get from Survey Generator support)
5. Company ID (get from Survey Generator support)
6. Survey ID (visible on the survey properties list of Survey Generator)



## Using the System

### Process Flow

The data integration process works as follows:



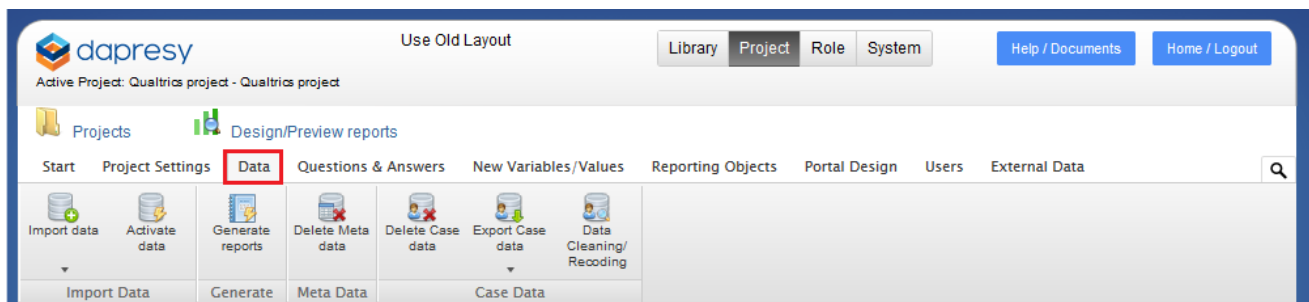
### Setup Integration

To set up a Survey Generator data source adapter, you must complete the following 5 tasks:

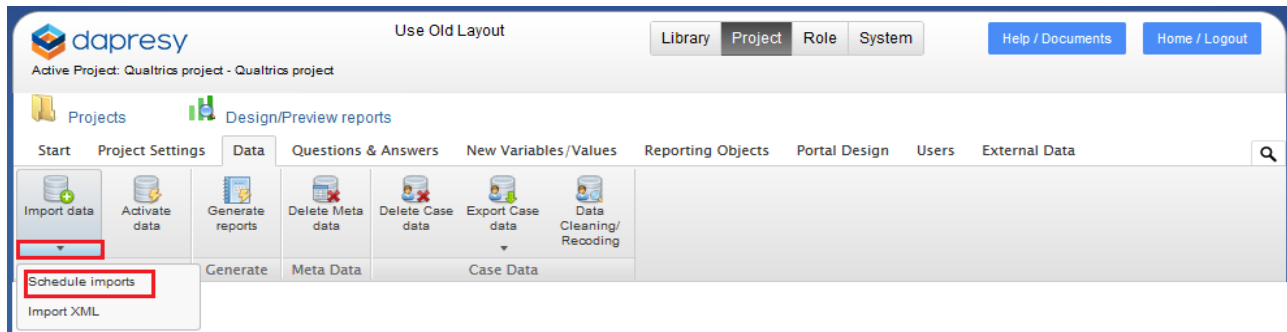
#### Task 1: Access Data Integration UI

To access Data Integration UI in Dapresy, please follow these 4 steps:

1. Log into Dapresy
2. Enter the **Data** tab from the main menu



3. Click on the arrow under **Import Data**, then select **Schedule imports** from the dropdown menu



Then the Data Integration UI will open

[Import Scheduler](#)

[Create import schedule](#)

Schedule name:   Active

Import tag:

Import type:   Run import on save

Date:  Current server time: 2018-02-26 10:23:43

Time:

Update to existing dataset(s):

Data options:  Import Metadata  
 Delete input variable data  
 Activate Data

Data source:   Retry import if unsuccessfull

FTP Server address:

FTP Username:

Password:

Secure FTP:  (Only explicit FTPS is currently supported)

Data file name:  (\* = wildcard)

Contact Email:

Send email after job completion  Send email after every task (eg. activation, generation of reports)

Send email on job failure

### Task 2: Create Data Adapter Instance

Your first Data Adapter is automatically created when you access Import Scheduler UI for the first time. This screen contains all of the setup controls for the new data adapter instance. Some of these parameters are mandatory, and some are optional. When you access this screen for the first time, you need to enter the **Schedule name** and tick the **Active** checkbox.

Schedule name:   Active

After the first Data Adapter has been created, then you can create another Data Adapter for the same project with different configurations. To create a new Data Adapter, just click the **'Create new'** button on Import scheduler UI.

[Select import schedule](#)

Selected import schedule:

The import schedule configuration form will be cleared for new parameters and configurations. Also, if you need to delete a Data Adapter, simply select the Data Adapter you would like to delete from the **Selected import schedule** dropdown list and then click the **'Delete selected'** button.

### Task 3: Set Data Import Scheduler

You can schedule every Import Scheduler job to be triggered just once or to be repeated based on one of the following schedules:

- Hourly
- Weekly
- Monthly

You can select the schedule type from the **'Import type'** dropdown menu on the Import Scheduler UI.

Import type:   Run import on save

Import server time: 2018-02-26 10:48:14

- Single import
- Weekly schedule
- Monthly schedule
- Hourly schedule

When the '**Run import on save**' checkbox is selected, then the import job will be triggered immediately after the **Save** button has been clicked. Scheduled jobs will also be saved for the time that you select.

#### Task 4: Choose Data Source

To select a Data Source for your Data Adapter, use the **Data source** dropdown menu.

Data source:

By default, the data source is set to the FTP Server. This should be changed to Survey Generator. When Survey Generator is selected as the data source, the configuration form will be loaded on UI.

Data source:   Retry import if unsuccessful

API Username:

API Password:

Username:

Password:

Company ID:

Survey ID:

Survey List:

Time period:

When "Total" time period is chosen all data is imported without date filtering.

### Task 5: Set up Data Source

To set up the Survey Generator data source, five mandatory items are needed: API Username, API Password, Username, Password and Company ID. To learn how to create these, read the Pre-Requirements section in this manual.

To set up the Survey Generator data source, simply follow these 10 steps:

1. Enter your **API Username** from Survey Generator
2. Enter the **API Password** for Survey Generator API
3. Enter **Username** for your user in Survey Generator
4. Enter **Password** for your user in Survey Generator
5. Enter your **Company ID** from Survey Generator

6. Click the **Load survey list** button
7. The survey list will be populated with all surveys from Survey Generator that are linked to the provided account

Data source:   Retry import if unsuccessful

API Username:

API Password:

Username:

Password:

Company ID:

Survey ID:

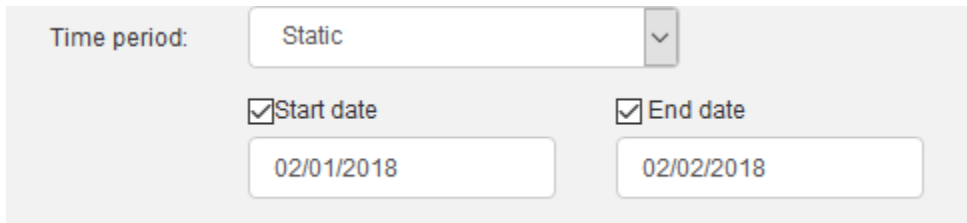
Survey List:

Time period:

When "Total" time period is chosen all data is imported without date filtering.

8. Select the desired survey. This will fill in the **Survey ID** field

9. Choose the time period for the selected survey's data. Select this from the **Time period** dropdown. If nothing is selected, then the system will load data from all respondents. If a specific date range is needed, then select the '**Static**' option from time period dropdown



The screenshot shows a configuration panel for the 'Time period' dropdown. The dropdown is currently set to 'Static'. Below the dropdown, there are two checked checkboxes: 'Start date' and 'End date'. Under 'Start date' is a text input field containing '02/01/2018'. Under 'End date' is a text input field containing '02/02/2018'.

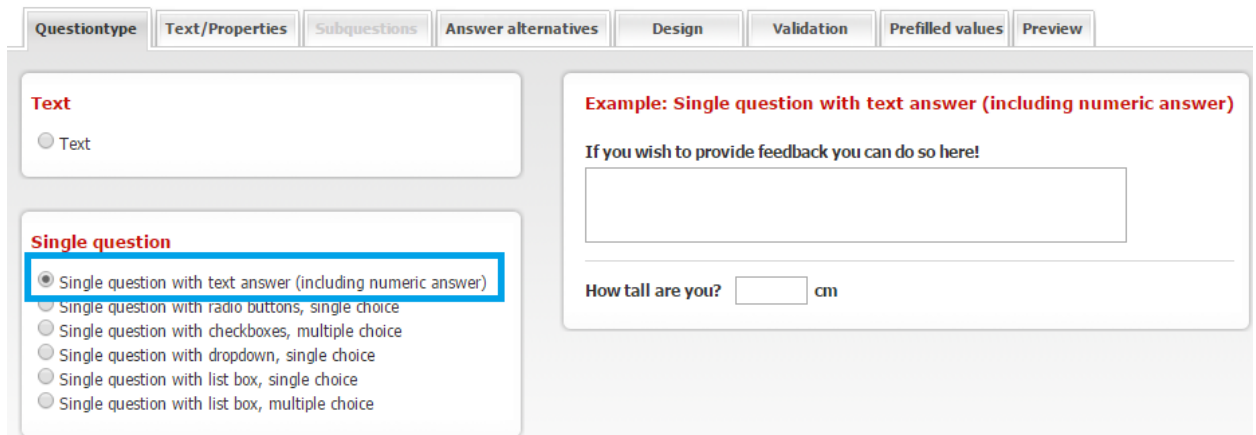
10. The Start and End date controls will appear. Simply check the Start and End date check boxes and choose the specific dates from the calendars

After completing these steps, Survey Generator Data Adapter will be configured and ready to use. The last step is to click '**Save**' at the end of the Import scheduler UI.

## Supported Survey Controls for Survey Generator

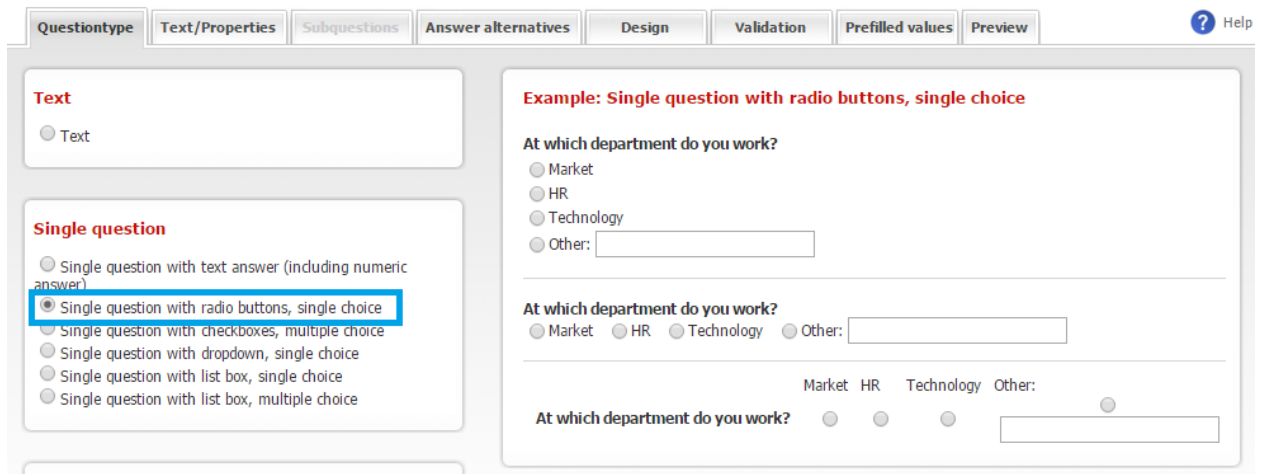
Below is the full list of survey controls currently supported by Survey Generator.

### 1. Single question with text answer



The screenshot shows the 'Text/Properties' tab of the Survey Generator. On the left, under the 'Text' category, there is a 'Text' control. Under the 'Single question' category, the 'Single question with text answer (including numeric answer)' option is selected and highlighted with a blue box. On the right, a preview window shows an example question: 'If you wish to provide feedback you can do so here!' with a text input field, and 'How tall are you?' with a numeric input field followed by 'cm'.

### 2. Single question with radio buttons, single-choice

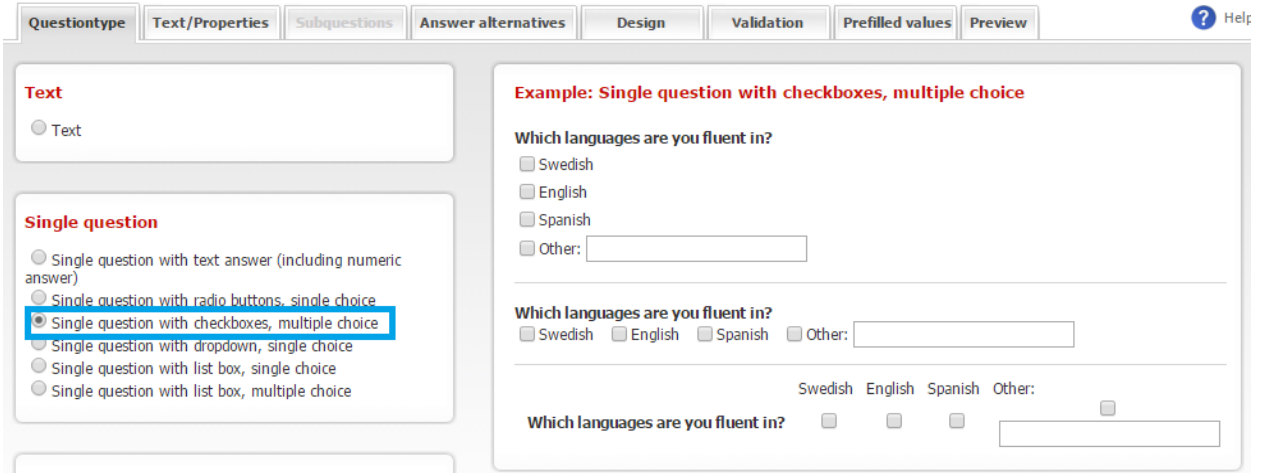


The screenshot shows the 'Text/Properties' tab of the Survey Generator. On the left, under the 'Single question' category, the 'Single question with radio buttons, single choice' option is selected and highlighted with a blue box. On the right, a preview window shows an example question: 'At which department do you work?' with radio buttons for 'Market', 'HR', and 'Technology', and an 'Other:' field with a text input. Below this, another version of the question is shown with radio buttons for 'Market', 'HR', and 'Technology', and an 'Other:' field with a text input.



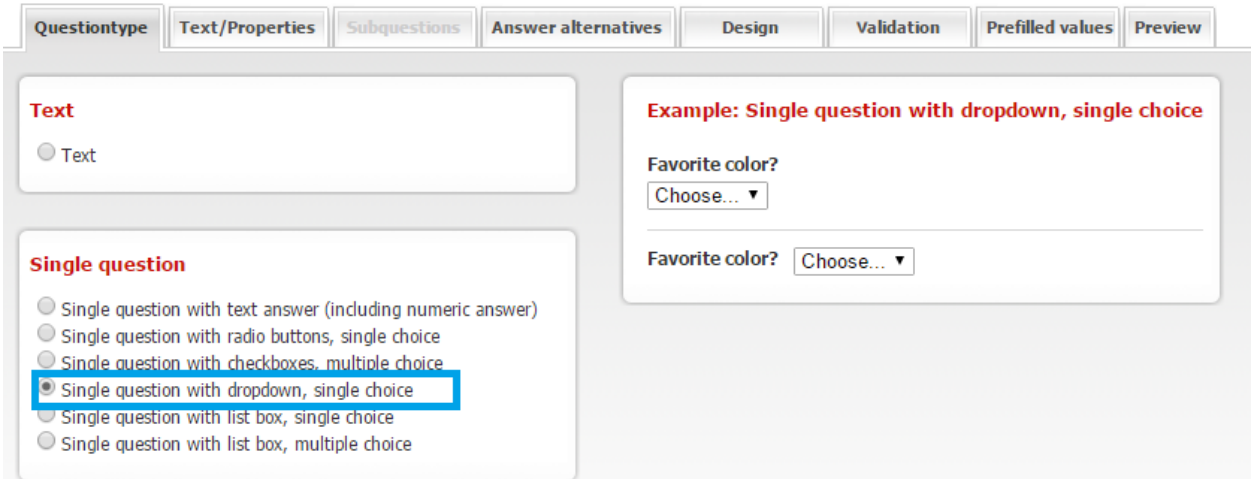


### 3. Single question with checkboxes, multiple-choice



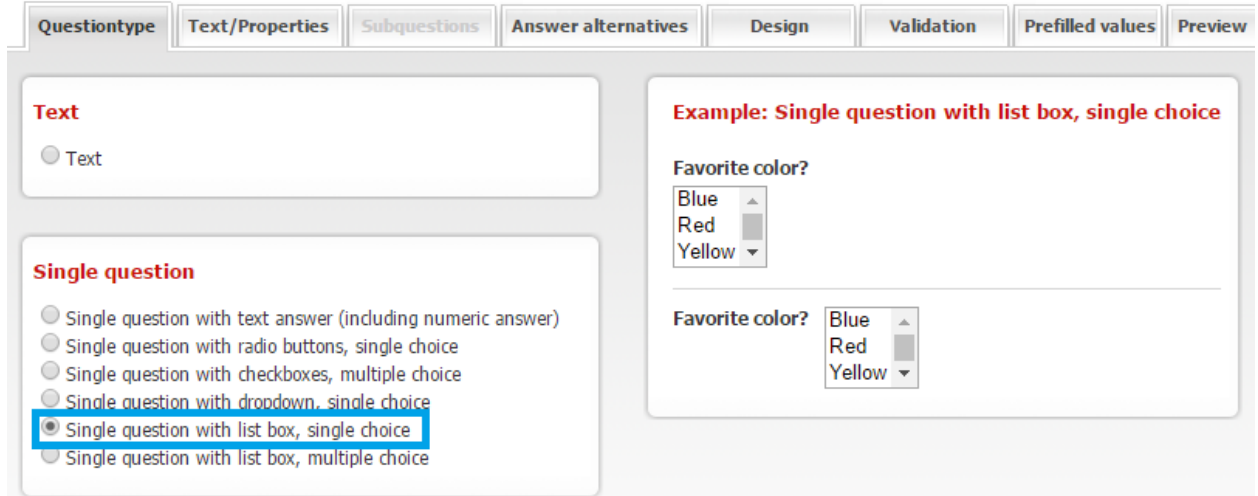
The screenshot shows the Dapresy question editor interface. At the top, there are tabs for 'Questiontype', 'Text/Properties', 'Subquestions', 'Answer alternatives', 'Design', 'Validation', 'Prefilled values', and 'Preview'. A 'Help' icon is in the top right. The 'Text/Properties' tab is active. On the left, under 'Text', there is a radio button for 'Text'. Under 'Single question', there are several options, with 'Single question with checkboxes, multiple choice' selected and highlighted with a blue box. On the right, there are three preview examples of the question: 'Which languages are you fluent in?'. The first example shows checkboxes for Swedish, English, Spanish, and an 'Other:' field with a text input. The second example shows the same question with the 'Other:' field filled with 'Swedish English Spanish Other:'. The third example shows the question with checkboxes for Swedish, English, Spanish, and Other, with the 'Other' checkbox selected and a text input field next to it.

### 4. Single question with dropdown, single-choice



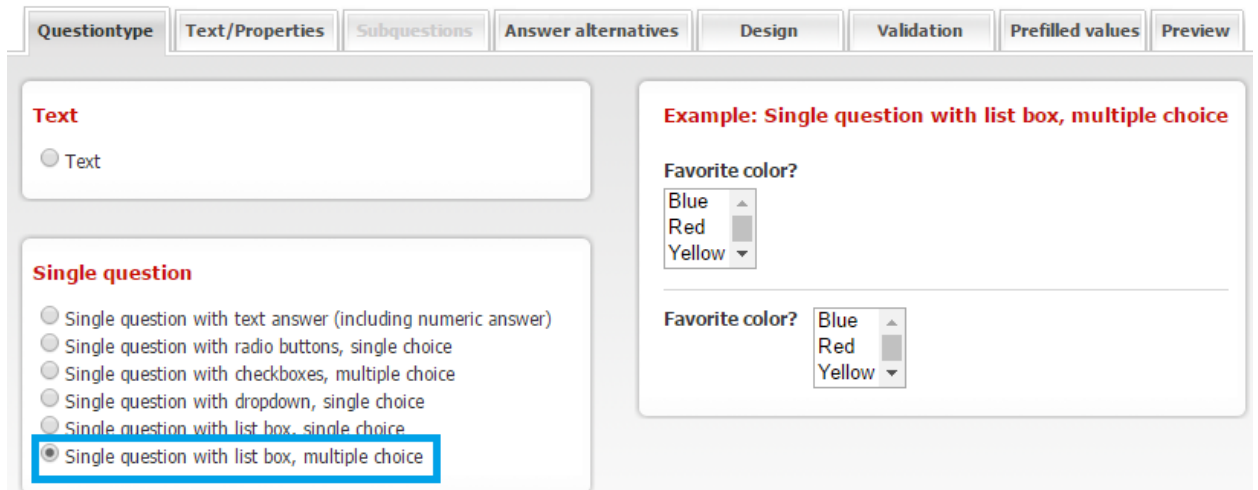
The screenshot shows the Dapresy question editor interface. At the top, there are tabs for 'Questiontype', 'Text/Properties', 'Subquestions', 'Answer alternatives', 'Design', 'Validation', 'Prefilled values', and 'Preview'. The 'Text/Properties' tab is active. On the left, under 'Text', there is a radio button for 'Text'. Under 'Single question', there are several options, with 'Single question with dropdown, single choice' selected and highlighted with a blue box. On the right, there are two preview examples of the question: 'Favorite color?'. The first example shows a dropdown menu with 'Choose...' and a downward arrow. The second example shows the same question with the dropdown menu filled with 'Choose...' and a downward arrow.

### 5. Single question with list box, single-choice



The screenshot shows the Dapresy interface with the 'Text/Properties' tab selected. The 'Questiontype' dropdown is set to 'Text'. In the 'Single question' section, the option 'Single question with list box, single choice' is selected and highlighted with a blue box. The 'Example' preview on the right shows a question 'Favorite color?' with a list box containing 'Blue', 'Red', and 'Yellow'.

### 6. Single question with list box, multiple-choice



The screenshot shows the Dapresy interface with the 'Text/Properties' tab selected. The 'Questiontype' dropdown is set to 'Text'. In the 'Single question' section, the option 'Single question with list box, multiple choice' is selected and highlighted with a blue box. The 'Example' preview on the right shows a question 'Favorite color?' with a list box containing 'Blue', 'Red', and 'Yellow'.

## 7. Matrix question with text answer

Questiontype | Text/Properties | Subquestions | Answer alternatives | Design | Validation | Prefilled values | Preview

**Text**

Text

---

**Single question**

- Single question with text answer (including numeric answer)
- Single question with radio buttons, single choice
- Single question with checkboxes, multiple choice
- Single question with dropdown, single choice
- Single question with list box, single choice
- Single question with list box, multiple choice

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**Matrix question**

- Matrix question with text answer (including numeric answer)
- Matrix question with radio buttons, single choice
- Matrix question with checkboxes, multiple choice
- Matrix question with dropdown, single choice
- Matrix question with list box, single choice
- Matrix question with list box, multiple choice

**Example: Matrix question with text answer (including numeric answer)**

Please enter the following company data:

Given name

Vat No:

Address

Zip code

City

Email

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**Name and address:**

Given name

Vat No:

Address

Zip code

## 8. Matrix question with radio buttons, single-choice

Questiontype | Text/Properties | Subquestions | Answer alternatives | Design | Validation | Prefilled values | Preview ? He

**Text**

Text

---

**Single question**

- Single question with text answer (including numeric answer)
- Single question with radio buttons, single choice
- Single question with checkboxes, multiple choice
- Single question with dropdown, single choice
- Single question with list box, single choice
- Single question with list box, multiple choice

---

**Matrix question**

- Matrix question with text answer (including numeric answer)
- Matrix question with radio buttons, single choice
- Matrix question with checkboxes, multiple choice
- Matrix question with dropdown, single choice
- Matrix question with list box, single choice
- Matrix question with list box, multiple choice

**Example: Matrix question with radio buttons, single choice**

**How often...**

	Daily	Once a week	Once a month	A few times per year	Rarely or never
...do you watch TV?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...do you go to the movies?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...do you eat out?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**How often...**

	Daily	Once a week	Once a month	A few times per year	Rarely or never
...do you watch TV?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...do you go to the movies?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...do you eat out?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please rate the following in terms of importance and how it currently matches your workplace**

	IMPORTANT					MATCH				
	1	2	3	4	5	1	2	3	4	5
...Nice colleagues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...Flexible hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...Good working environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...Good salary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### 9. Matrix question with checkboxes, multiple-choice

Questiontype | Text/Properties | Subquestions | Answer alternatives | Design | Validation | Prefilled values | Preview ?

**Text**

- Text

**Single question**

- Single question with text answer (including numeric answer)
- Single question with radio buttons, single choice
- Single question with checkboxes, multiple choice
- Single question with dropdown, single choice
- Single question with list box, single choice
- Single question with list box, multiple choice

**Matrix question**

- Matrix question with text answer (including numeric answer)
- Matrix question with radio buttons, single choice
- Matrix question with checkboxes, multiple choice
- Matrix question with dropdown, single choice
- Matrix question with list box, single choice
- Matrix question with list box, multiple choice

**Example: Matrix question with checkboxes, multiple choice**

Which week-days are you doing for the following?

	Mon	Tue	Wed	Thu	Fri	Sat, what time?	Sun
...watching TV?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...going to the movies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...eating at restaurants?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Which week-days are you doing for the following?

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
...watching TV?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...going to the movies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...eating at restaurants?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### 10. Matrix question with dropdown, single-choice

Questiontype | Text/Properties | Subquestions | Answer alternatives | Design | Validation | Prefilled values | Preview

**Text**

- Text

**Single question**

- Single question with text answer (including numeric answer)
- Single question with radio buttons, single choice
- Single question with checkboxes, multiple choice
- Single question with dropdown, single choice
- Single question with list box, single choice
- Single question with list box, multiple choice

**Matrix question**

- Matrix question with text answer (including numeric answer)
- Matrix question with radio buttons, single choice
- Matrix question with checkboxes, multiple choice
- Matrix question with dropdown, single choice
- Matrix question with list box, single choice
- Matrix question with list box, multiple choice

**Example: Matrix question with dropdown, single choice**

Please rate Survey Generator!  
1 = Lowest score, 5 = highest score

Usability

Functionality

Flexibility

---

Please rate Survey Generator!  
1 = Lowest score, 5 = highest score

Usability  of 5

Functionality  of 5

Flexibility  of 5

### 11. Matrix question with list box, single-choice

Questiontype | Text/Properties | Subquestions | Answer alternatives | Design | Validation | Prefilled values | Preview

**Text**

- Text

**Single question**

- Single question with text answer (including numeric answer)
- Single question with radio buttons, single choice
- Single question with checkboxes, multiple choice
- Single question with dropdown, single choice
- Single question with list box, single choice
- Single question with list box, multiple choice

**Matrix question**

- Matrix question with text answer (including numeric answer)
- Matrix question with radio buttons, single choice
- Matrix question with checkboxes, multiple choice
- Matrix question with dropdown, single choice
- Matrix question with list box, single choice
- Matrix question with list box, multiple choice

**Example: Matrix question with list box, single choice**

Please rate Survey Generator!  
1 = Lowest score, 5 = highest score

Usability	Very good ▲ Good Neutral ▼
Functionality	Very good ▲ Good Neutral ▼
Flexibility	Very good ▲ Good Neutral ▼

### 12. Matrix question with list box, multiple-choice

Questiontype | Text/Properties | Subquestions | Answer alternatives | Design | Validation | Prefilled values | Preview

**Text**

- Text

**Single question**

- Single question with text answer (including numeric answer)
- Single question with radio buttons, single choice
- Single question with checkboxes, multiple choice
- Single question with dropdown, single choice
- Single question with list box, single choice
- Single question with list box, multiple choice

**Matrix question**

- Matrix question with text answer (including numeric answer)
- Matrix question with radio buttons, single choice
- Matrix question with checkboxes, multiple choice
- Matrix question with dropdown, single choice
- Matrix question with list box, single choice
- Matrix question with list box, multiple choice

**Example: Matrix question with list box, multiple choice**

Which are the main ingredients in the following dishes

Saucage Stroganoff	Saucage ▲ Bacon Rice ▼
Spaghetti Carbonara	Saucage ▲ Bacon Rice ▼
Pancake	Saucage ▲ Bacon Rice ▼