



Data Integration User Manual

-EFS Integration-



Revision history

Version	Date	Revision Description
1.0	02/06/2017	Initial version
1.1	03/02/2018	Document modified for new UI



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Overview

Scope

This document is a user manual for Survey Gizmo 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 Gizmo Data Integration and how to use it in the Dapresy system.



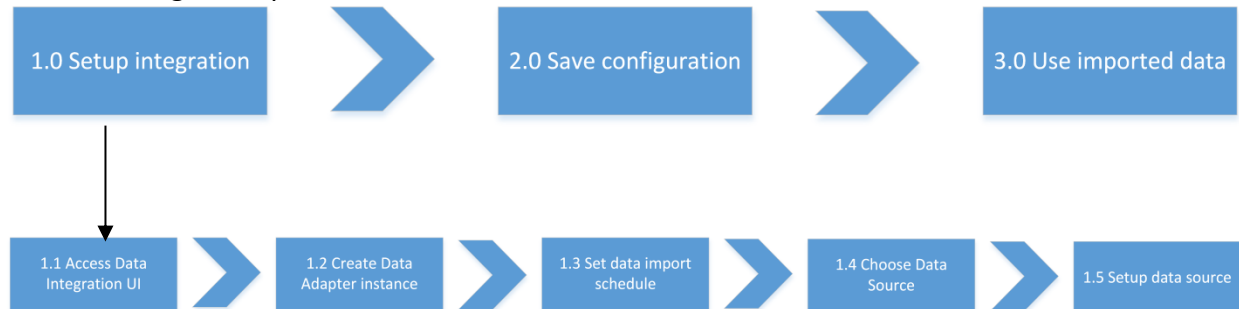
Getting Started

//TO DO: Currently missing

Using the System

Process Flow

The data integration process works as follows:



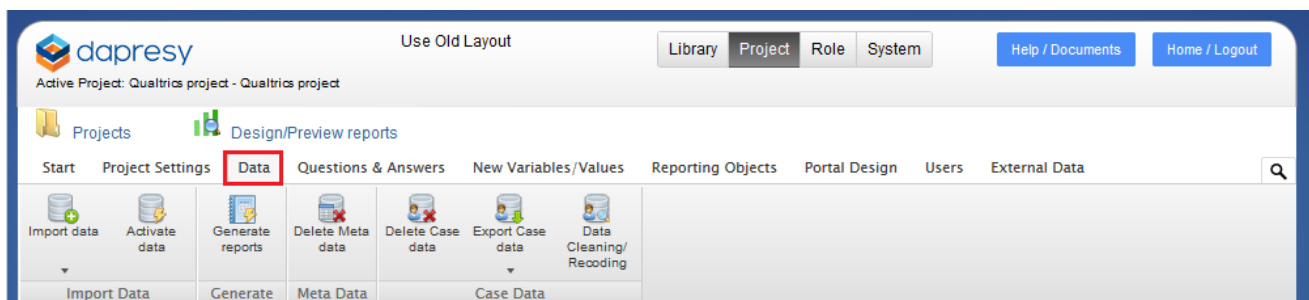
Setup Integration

To setup a Survey Gizmo data source adapter, you must complete the following 5 tasks:

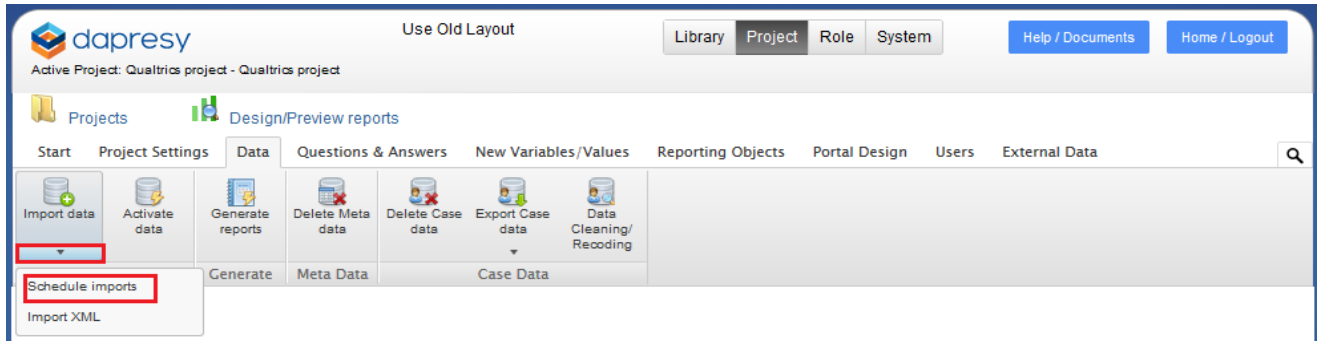
Task 1: Access Data Integration UI

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



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 unsuccessful

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 check 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 EFS. There are more than one EFS endpoints in 'Data source' dropdown. Every endpoint starts with 'EFS' word. Proper endpoint should be selected here. When proper EFS endpoint is selected as the data source, the configuration form will be loaded on UI.

Task 5: Set up Data Source

To set up the EFS data source, two mandatory parameters are needed: Web service key and Project ID. **To learn how to get these, see Pre-Requirements on Page 5 of this manual (Must be corrected later).**

To set up the EFS data source, simply follow these 7 steps:

1. Enter your unique **Web service key** from EFS
2. Enter the **Project ID** from EFS that you need data from

Data source: Retry import if unsuccessful

Web service key:

Project ID:

Disposition codes: *(leave empty to import all responses)*

Time period:

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

3. Enter **Disposition codes** if needed. These codes are used to get data only from specific respondents' groups

Data source: Retry import if unsuccessful

Web service key:

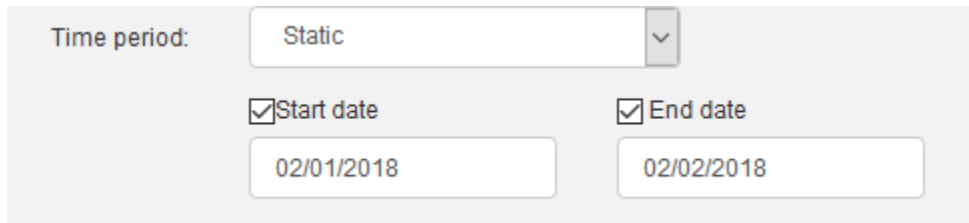
Project ID:

Disposition codes: *(leave empty to import all responses)*

Time period:

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

4. 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 the time period dropdown list



Time period: Static

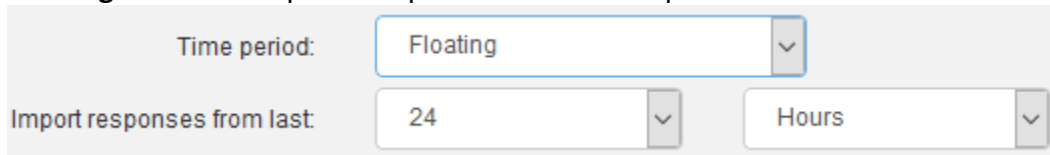
Start date End date

02/01/2018 02/02/2018

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

There are other options in this dropdown too:

Floating – With this option it’s possible to filter responses for exact number of hours/days

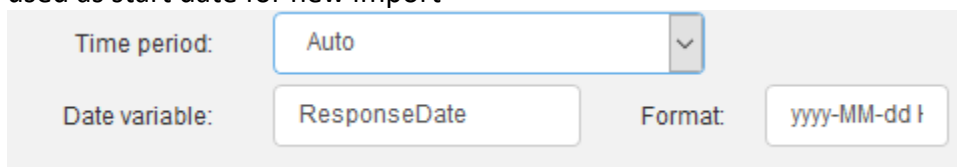


Time period: Floating

Import responses from last: 24 Hours

Total – Enables you to download responses from survey full period

Auto – When this option is chosen then the highest imported response date in the system is used as start date for new import



Time period: Auto

Date variable: ResponseDate Format: yyyy-MM-dd t

After completing these steps, Survey Gizmo 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 EFS

//TO DO: Currently missing