Data Integration User Manual

-Qualtrics Integration-

Revision history

Version	Date	Revision Description
1.0	5/30/2016	Initial version
1.1	03/02/2018	Document modified for new UI
1.2	11/21/2018	Supported controls from Qualtrics survey chapter updated
1.3	03/06/2019	Updated information regarding URL to be used for connection

Table of Contents

Overview

Scope

This document is a user manual for Qualtrics Data Integration. It contains all relevant information relevant for this integration that has been implemented in the Dapresy system.

Purpose

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

Getting Started

Integration Overview

This API allows you to export survey data from Qualtrics (https://www.qualtrics.com/) directly into Dapresy to be used as a data source.
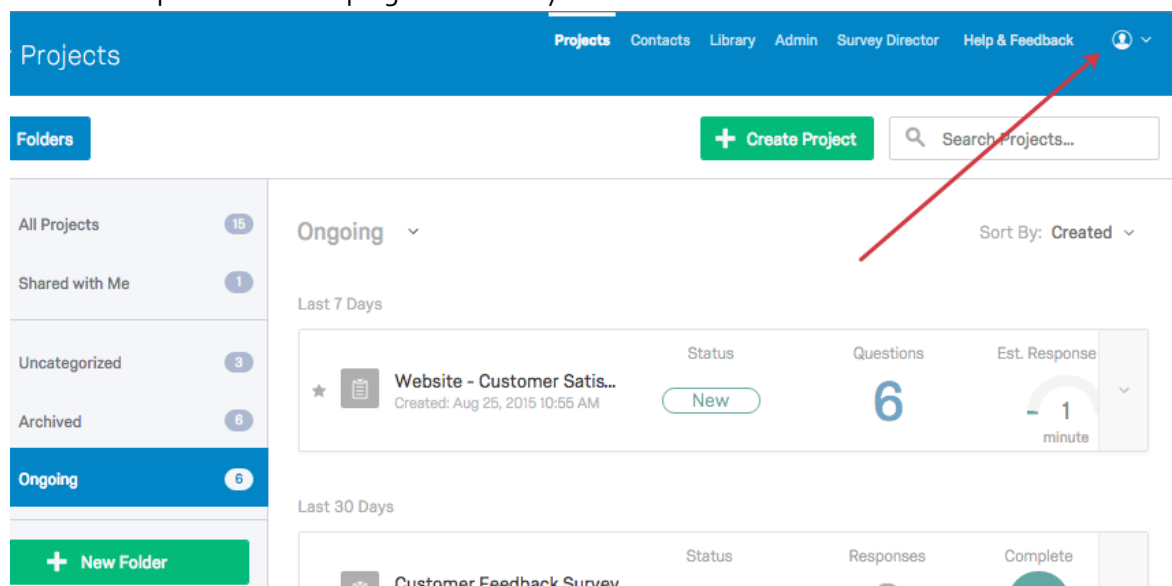
Pre-Requirements

In order to use this Qualtrics Data Integration, you will need to have an account on Qualtrics with the API feature enabled. This will allow you to create an API token. An API token is a mandatory parameter for this integration into Dapresy.

Another important parameter is the API base URL which will include the path to the API. Qualtrics has multiple URL's for APIs, so it depends on the end user's location.

How to Create an API Token

Follow these 5 steps to create an API Token:

1. Log into Qualtrics

2. Click on the person in the top right corner of your account

3. Select **Account Settings**

4. Click **Qualtrics Ids** on the navigation bar

5. In the box labeled API, click **Generate Token**

NOTE: Do not click the '**Generate Token**' if you already have a token. An API taken only needs to be generated once. **If you generate a new token while you have existing integrations using the old token, then those existing integrations will need to be updated with the new token.**

How to Create the Correct URL

Follow these 2 steps to create a base URL:

1. Go to https://qualtrics.com and login with your account

2. After you log in, you will be redirected to the nearest Qualtrics server, then just copy the base URL from your browser and add "API/v3" to that

Here we would have `https://co1.qualtrics.com/API/v3`

Using the System

Process Flow

The data integration process works like below:
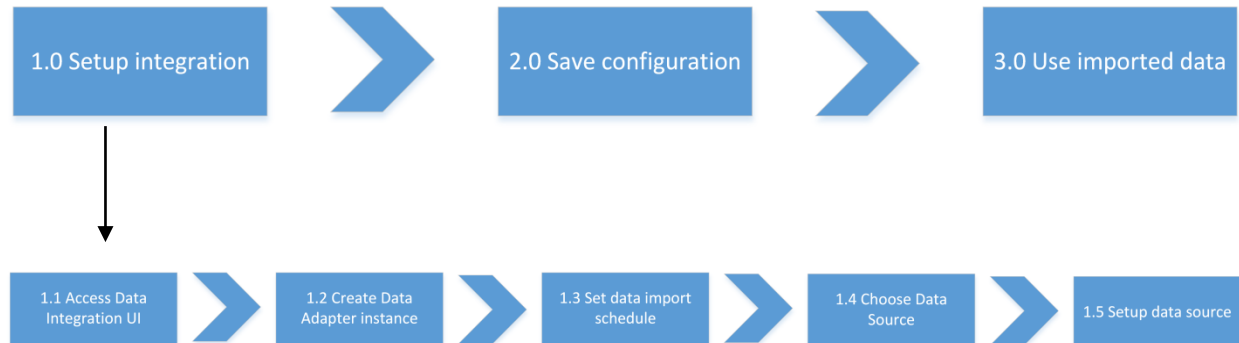
Setup Integration

To setup Qualtrics 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. Select the **Data** tab from the main menu

3. Click on arrow under **Import Data** and then select **Scheduler imports** from dropdown menu

Then the Data Integration UI will be opened

Import Scheduler

Create import schedule

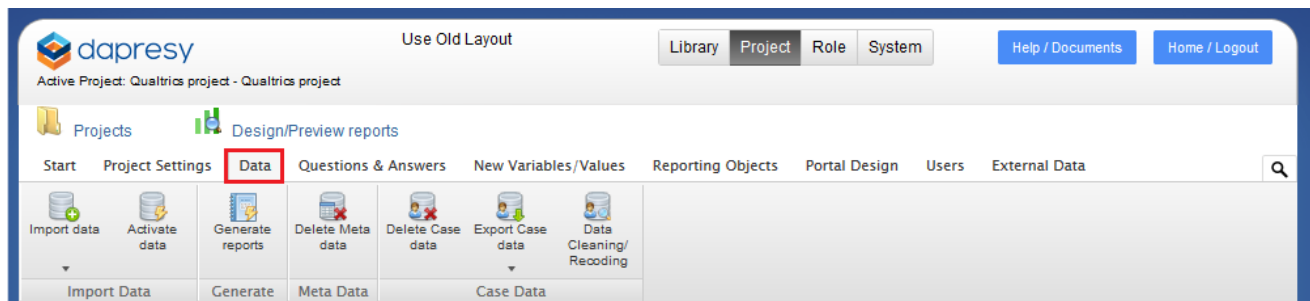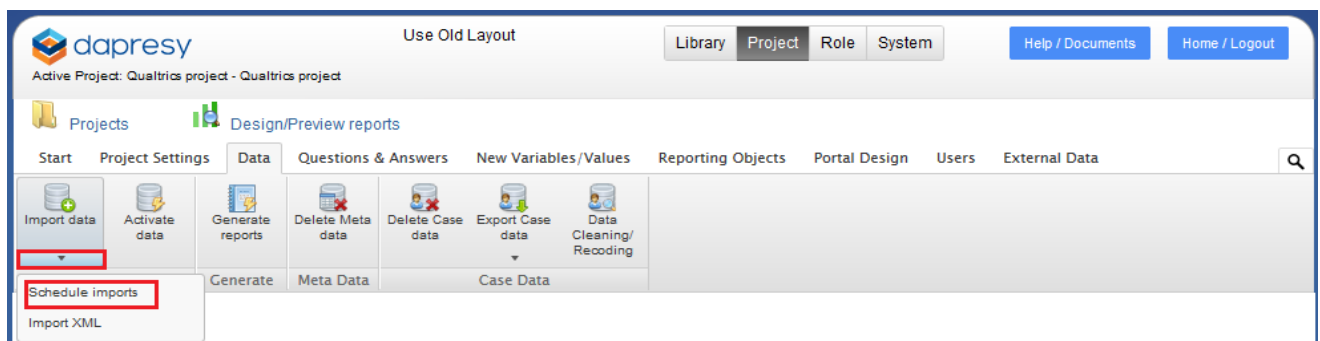|	
Schedule name:	☑ Active
Import tag:	<no tag> ⌄ Edit tags...
Import type:	Single import ⌄ ☐ Run import on save
	Date: 02/26/2018 Current server time: 2018-02-26 10:23:43
	Time: 11:00 ⌄
Update to existing dataset(s): ☐	Select mapping variable ⌄
Data options:	☐ Import Metadata
	☐ Delete input variable data
	☐ Activate Data
Data source:	FTP Server ⌄ ☐ 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
	Show logs Save

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.

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

Every Import Scheduler job can be scheduled 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.

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.

By default, the data source is set to the FTP Server, but this should be changed to **Qualtrics**. When Qualtrics is selected as the data source, then the configuration form will be loaded on UI.

Task 5: Set up Data Source

To set up the Qualtrics data source, two mandatory parameters are needed: API token and base URL. To learn how to create these, see Pre-Requirements on Page 5 of this manual.

To set up Qualtrics data source, follow these 7 steps:

1. Enter your unique **API token** from Qualtrics

2. Enter the base URL and API location of the Qualtrics API
   example: `https://survey.qualtricsserver.com/API/v3`
   (Note: it is important to include the API/v3 after the server name, this is used to correctly reference the API)

3. Click on the **Load survey list** button

4. The survey list will be populated with all surveys from Qualtrics that are linked to the provided API token

5. Select the desired survey, and the **Survey Id** field will be populated

6. 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.

7. 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. Please refer to Dapresy documentation for details of all time selections available.

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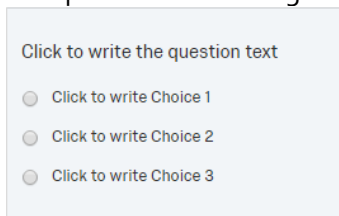
Supported Controls from Qualtrics Survey

After the Qualtrics Data Adapter has been configured, everything is ready to pull data from Qualtrics into Dapresy. **It's important to note that Dapresy can't support data from all Qualtrics survey's controls.** Qualtrics has many different controls that can be selected as survey questions. The data format in the backend of these controls can be different, therefore some of them are not currently supported by Dapresy.

Supported Controls

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

1. Multiple choice with single answers

2. Multiple choice with multiple answers

Click to write the question text

☐ Click to write Choice 1

☐ Click to write Choice 2

☐ Click to write Choice 3

3. Text entry – single line

Click to write the question text

4. Text entry – multi line

Click to write the question text

5. Matrix – Likert – Single-choice answers

Click to write the question text

	Click to write Scale point 1	Click to write Scale point 2	Click to write Scale point 3
Click to write Choice 1	○	○	○
Click to write Choice 2	○	○	○
Click to write Choice 3	○	○	○

6. Matrix – Likert – Multi-choice answers

Click to write the question text

	Click to write Scale point 1	Click to write Scale point 2	Click to write Scale point 3
Click to write Choice 1	☐	☐	☐
Click to write Choice 2	☐	☐	☐
Click to write Choice 3	☐	☐	☐

7. Matrix – Likert – Dropdown

Click to write the question text

Click to write Choice 1   [▼]

Click to write Choice 2   [▼]

Click to write Choice 3   [▼]

Click here to edit scale points

8. Matrix – Profile – Single-choice answers

Click to write the question text

	Click to write Scale point 1	Click to write Scale point 2	Click to write Scale point 3
Click to write Choice 1	○	○	○
Click to write Choice 2	○	○	○
Click to write Choice 3	○	○	○

9. Matrix – Profile – Multi-choice answers

Click to write the question text

	Click to write Scale point 1	Click to write Scale point 2	Click to write Scale point 3
Click to write Choice 1	☐	☐	☐
Click to write Choice 2	☐	☐	☐
Click to write Choice 3	☐	☐	☐

10. Matrix – Profile – Dropdown

Click to write the question text

Click to write Choice 1   [▼]

Click to write Choice 2   [▼]

Click to write Choice 3   [▼]

Click here to edit scale points

11. Matrix – bipolar

Click to write the question text

Click to write Scale point 1	○ ○ ○	Click to write Scale point 2
Click to write Scale point 1	○ ○ ○	Click to write Scale point 2
Click to write Scale point 1	○ ○ ○	Click to write Scale point 2

12. Rank order control – Drag and drop

Click to write the question text

Click to write Item 1   [1]

Click to write Item 2   [2]

Click to write Item 3   [3]

13. Rank order control – Drag and drop (graphic)

Rank the following credit cards, a rank of 1 being your most favorite and 3 being your least favorite.
Add Block

VISA GOLD   Visa   [1]

Platinum MasterCard   MasterCard   [2] anced

American Express   [3]

Library

14. Rank order control – Radio buttons

Click to write the question text

	1	2	3
Click to write Item 1	○	○	○
Click to write Item 2	○	○	○
Click to write Item 3	○	○	○

15. Rank order control – Horizontal

Click to write the question text

Click to write Item 1   Click to write Item 2   Click to write Item 3

16. Rank order control – Horizontal (graphic)

Please rank the following credit cards from 1 (most preferred) to 3 (least preferred):

VISA GOLD   AMERICAN EXPRESS   Platinum MasterCard

17. Rank order control – Horizontal text entry

Please identify and rank your favorite dishes to cook:

Entree: Bread:

Dessert:

18. Rank order control – Selection box

Rank the following movies in order of preference (most preferred item at the top):

Star Wars
Pride and Prejudice
True Lies
Titanic
Lord of the Rings

↑
↓

↑
↓

19. Rank order control – Vertical

Rank the following movies in order of preference from 1 (least liked) to 4 (most liked) :

Star Wars

The Addams Family

Star Trek

Little Women

20. Rank order control – Vertical (graphic)

Please rank the following credit cards from 1 (most preferred) to 3 (least preferred):

21. Rank order control – Vertical text entry

Rank the following Disney movies in order of preference from 1 to 4 (most preferred) :

[ ] Aladdin - Favorite Character:

[ ] Mulan - Favorite Character:

[ ] The Little Mermaid - Favorite Character:

[ ] Beauty and the Beast - Favorite Character:

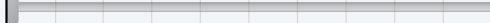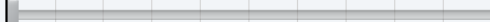## 22. Slider – Draggable bars

Click to write the question text

23. Slider – Draggable slider

Click to write the question text

24. Slider – Stars

Click to write the question text

Click to write Choice 1 ☆☆☆☆☆

Click to write Choice 2 ☆☆☆☆☆

Click to write Choice 3 ☆☆☆☆☆

25. Constant sum – Draggable bars

Click to write the question text

	Click to write Label 1			Click to write Label 2			Click to write Label 3		
	0 10 20 30	40 50 60 70	80 90 100

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

26. Constant sum – Horizontal graphic

What percentage of your purchases are made with these cards?

0 [Platinum MasterCard] 0 [VISA GOLD] 0 [AMERICAN EXPRESS]

27. Constant sum – Horizontal text

Click to write the question text

0 Click to write Choice 1   0 Click to write Choice 2   0 Click to write Choice 3

28. Constant sum – Vertical graphic

What percentage of your purchases are made with these cards?

0 [Platinum MasterCard]

0 [VISA GOLD]

0 [AMERICAN EXPRESS]

29. Constant sum - Vertical text
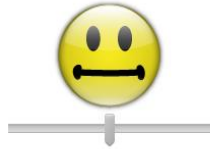
Click to write the question text

0 Click to write Choice 1

0 Click to write Choice 2

0 Click to write Choice 3

30. Graphic slider – Text above

What letter grade would you give to your flight instructor?

31. Graphic slider – Text below

Overall, how happy are you with our product?

32. Graphic slider – Text left

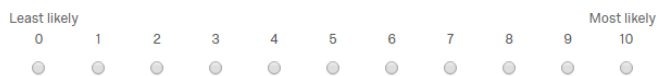What letter grade would you give your scuba instructor?

33. Graphic slider – Text right

Overall, how happy are you with our product?

34. Net promoter Score

How likely are you to recommend Qualtrics to a colleague?

Least likely										Most likely
0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

35. Hotspot – Like/Dislike

Please click once on the concepts you like (green) and twice on those you dislike (red).

36. Hotspot – On/Off

Please click on the concepts you like (turning them green).

Unsupported Controls

The following controls are unsupported:

1. Side by side

2. Pick, group and rank – Drag and drop

3. Pick, group and rank – No columns

Click to write the question text

Items	Click to write Group 1
Click to write Choice 1	
Click to write Choice 2	
Click to write Choice 3	
	Click to write Group 2
	Click to write Group 3

4. Heatmap

Click on the area of the image that stands out most.

5. Gap analysis – Positive and Negative

How satisfied do you feel when you eat at the following restaurants?

6. Drill down

Please select your car from the following options:

Year ▾
Make ▾
Model ▾

7. Constant sum – Graphic w/Total

What percentage of your purchases are made with these cards?

Platinum MasterCard	0
Visa Gold	0
(American Express)	0
Total	0

8. Constant sum – Text w/Total

What percentage of your discretionary money do you spend on the following items? (Total must sum to 100):

Entertainment	0
Electronics	0
Clothes	0
Food	0
Total	0

Additional variables

The Qualtrics API has a special field used for Response ID which is not shown in the metadata definition, but it is included in the case-data that is received from Qualtrics.

This filed can be added as an additional open text variable in Dapresy Pro.

For example, a typical case data message looks like this:

"responses": [{
   "ResponseID": "R_4cdeZhZ0kaAXcCJ7",
   "ResponseSet": "Default Response Set",
   "IPAddress": "",
   "StartDate": "2018-11-30 21:35:11",
   "EndDate": "2018-11-30 21:35:11",
   "RecipientLastName": "",
   "RecipientFirstName": "",
   "RecipientEmail": "",
Etc. ....

There is an additional open text variable to every Qualtrics respondent that is imported. It has the code "QualtricsResponseID" and Report Text "Original Qualtrics Response ID" which for the example includes the value R_4cdeZhZ0kaAXcCJ7 for this respondent. This makes it possible to trace respondents from the Qualtrics system in Dapresy Pro with a guaranteed unique value for each case.