



Data Integration User Manual

-Survalyzer Integration-

**Revision history**

Version	Date	Revision Description
1.0	03/05/2018	Document modified for new UI



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Overview

Scope

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

Getting Started

Integration Overview

This API allows you to export survey data from Survalyzer (<https://www.survalyzer.com/>) directly into Dapresy to be used as a data source.

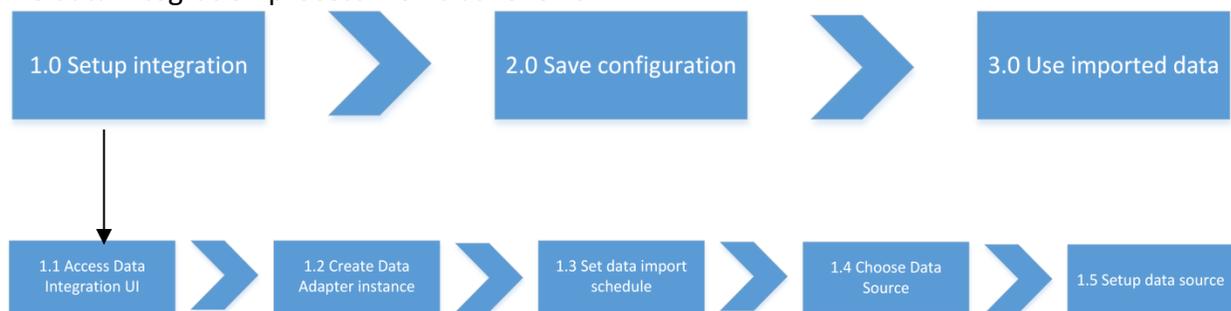
Pre-Requirements

In order to use this Integration, you will need to have an account with Survalyzer, and the server that you are using for the scheduled download will need to be whitelisted in the Survalyzer Firewall.

Using the System

Process Flow

The data integration process works as follows:



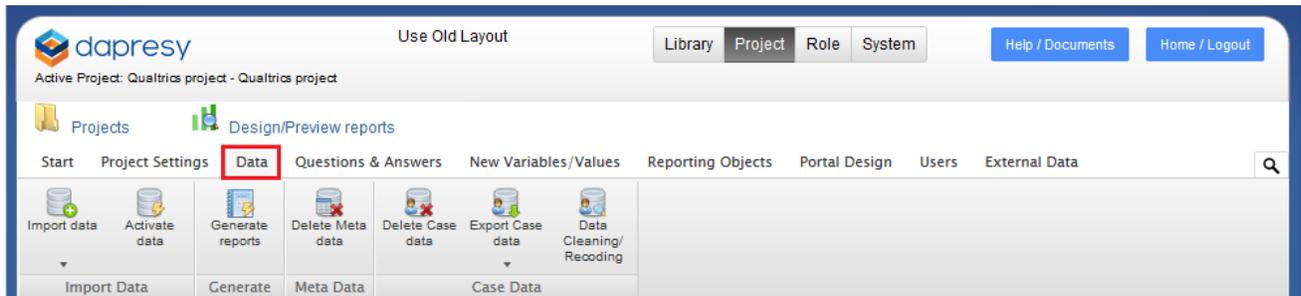
Setup Integration

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

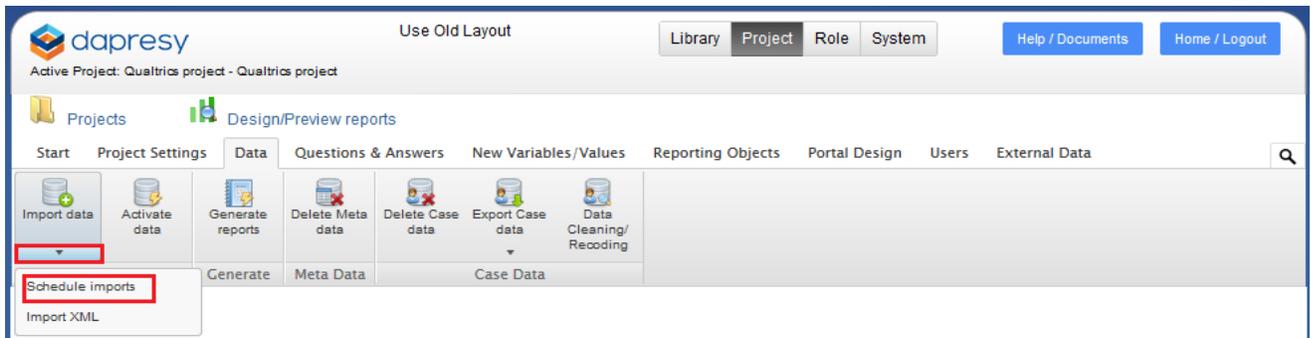
Task 1: Access Data Integration UI

To access Data Integration UI in Dapresy, please follow these 3 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

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

Single import
Weekly schedule
Monthly schedule
Hourly schedule

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

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 Survalyzer. When Survalyzer is selected as the data source, the configuration form will be loaded on UI.

Data source: Retry import if unsuccessful

Username:

Password:

Base URL:

Survey ID:

Survey List:

Task 5: Set up Data Source

To set up the Survalyzer data source, you will need the credentials to use in the dialog: Username, Password and Base URL – this the location of the Survalyzer API, it will start with https://.

Check that your credentials work by logging into [Survalyzer](#)



SURVALYZER

Username

Password

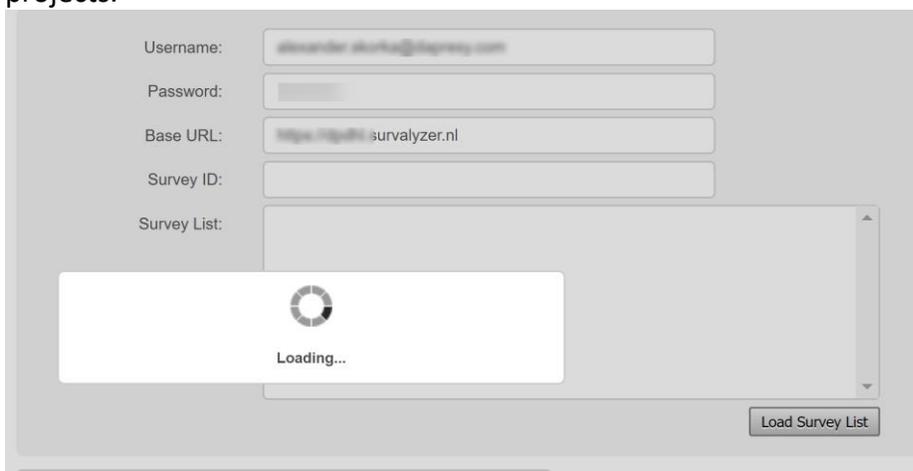
[Forgot your password?](#)

Sign In

[Are you using a legacy system?](#)

Then enter the details in the scheduled task, click on “Load Survey List” and the available projects will load. If there is an error here and you are sure your credentials are correct, the most likely cause is that the Survalyzer system is not allowing requests through their firewall from our server. This needs to be resolve by Survalyzer support.

After clicking Load Survey List the system will connect to Survalyzer and retrieve the available projects.



Username:

Password:

Base URL:

Survey ID:

Survey List:


Loading...

Load Survey List

Select the required survey in the list and the Survey ID text box will be filled in:

Data source: Retry import if unsuccessful

Username:

Password:

Base URL:

Survey ID:

Survey List:

- ...
- SURVALYZER TEST don't delete
- ...

Save the job when you have set the appropriate options.

After the job has run it is possible to view the SPSS file generated with the download SPSS option.

Contact Email:

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

Send email on job failure

This can be used as a manual import to create new metadata translations. Please see [Dapresy documentation](#) for more detail on creating meta data transformations.