



# Data Integration User Manual

## -Survey Gizmo Integration-

## Revision history

Version	Date	Revision Description
1.0	11/21/2016	Initial version
1.1	05/09/2017	New template and added endpoint section
1.2	03/05/2018	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

### Integration Overview

This API allows you to export survey data from Survey Gizmo ([https:// www.surveygizmo.com/](https://www.surveygizmo.com/)) directly into Dapresy to be used as a data source.

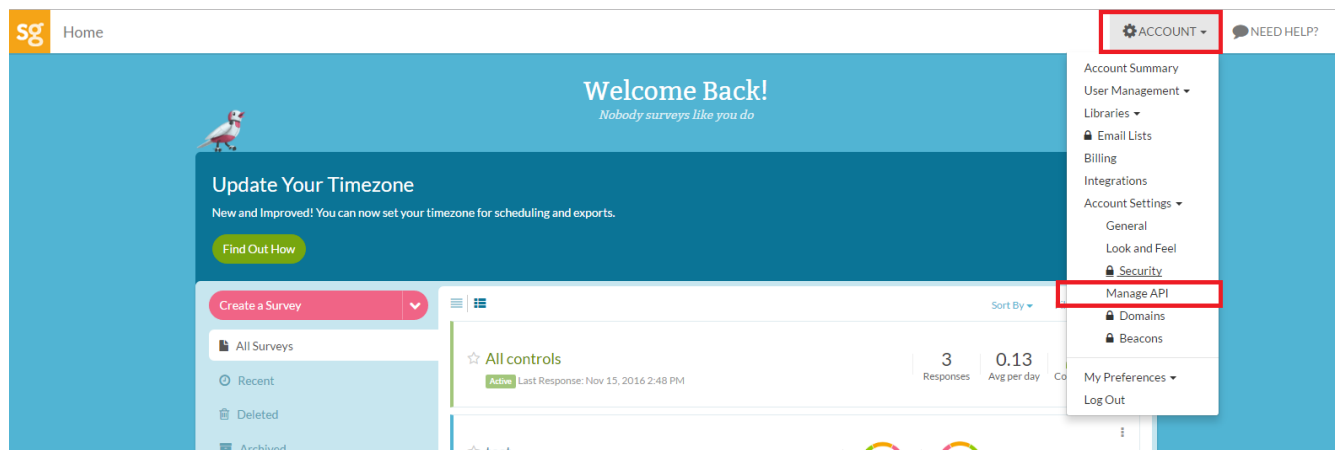
### Pre-Requirements

In order to use this Survey Gizmo Data Integration, you will need to have an account on Survey Gizmo with the API feature enabled. This will allow you to get an *API Key* and *Access Token*. These are mandatory for integration into Dapresy.

### How to get API key from Survey Gizmo

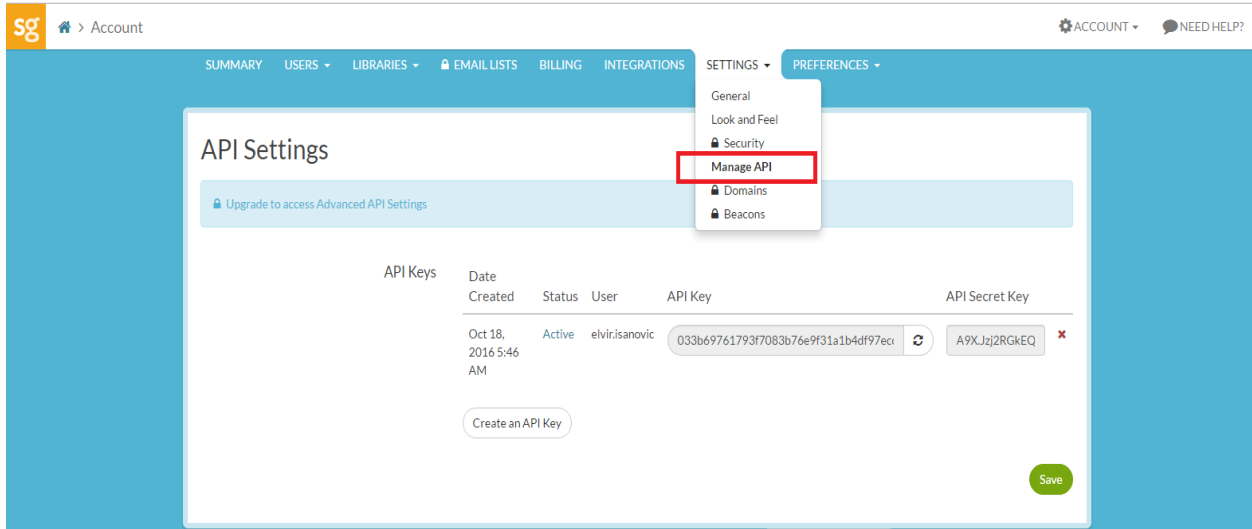
Follow these easy steps to get an API key for the Survey Gizmo API:

1. Log into the Survey Gizmo developers portal <https://app.surveygizmo.com/login/v1> with your Survey Gizmo credentials
2. Go to **Account** menu item
3. Choose **Manage API**

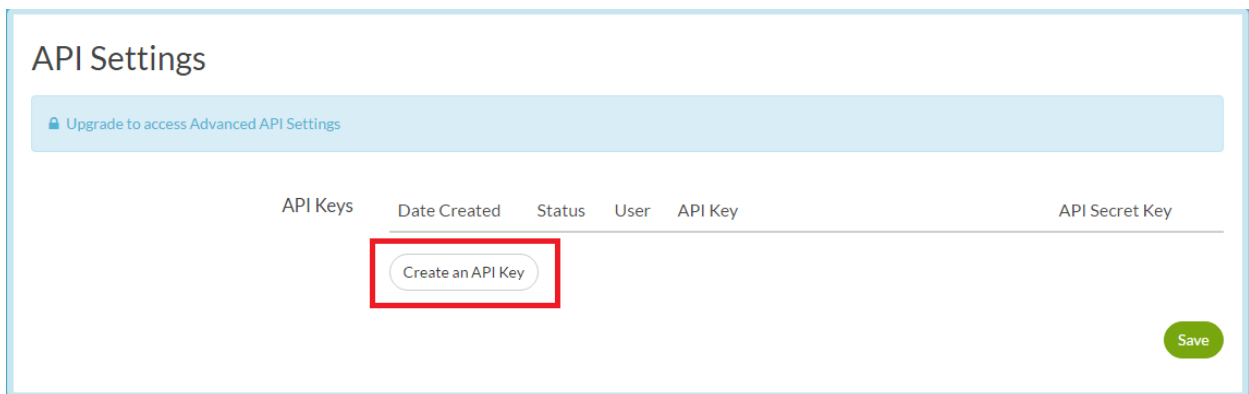


Or on the Account section:

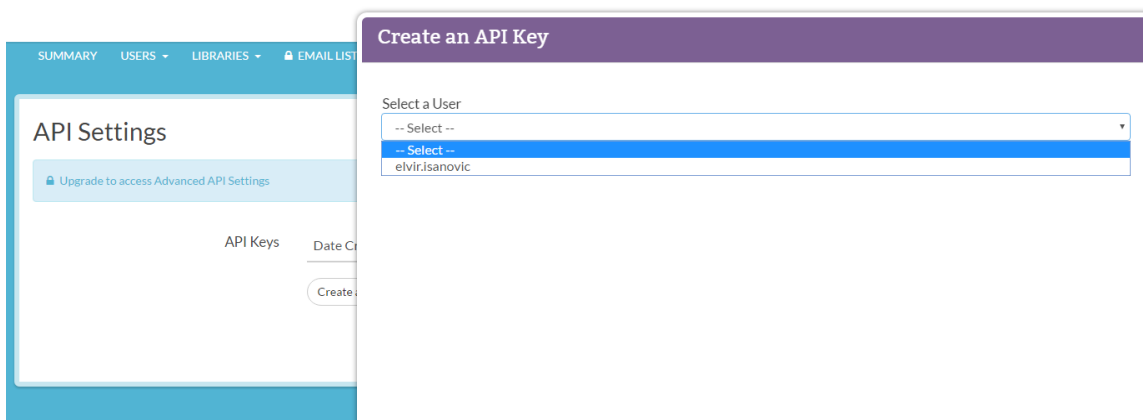
1. Go to Settings
2. Choose Manage API



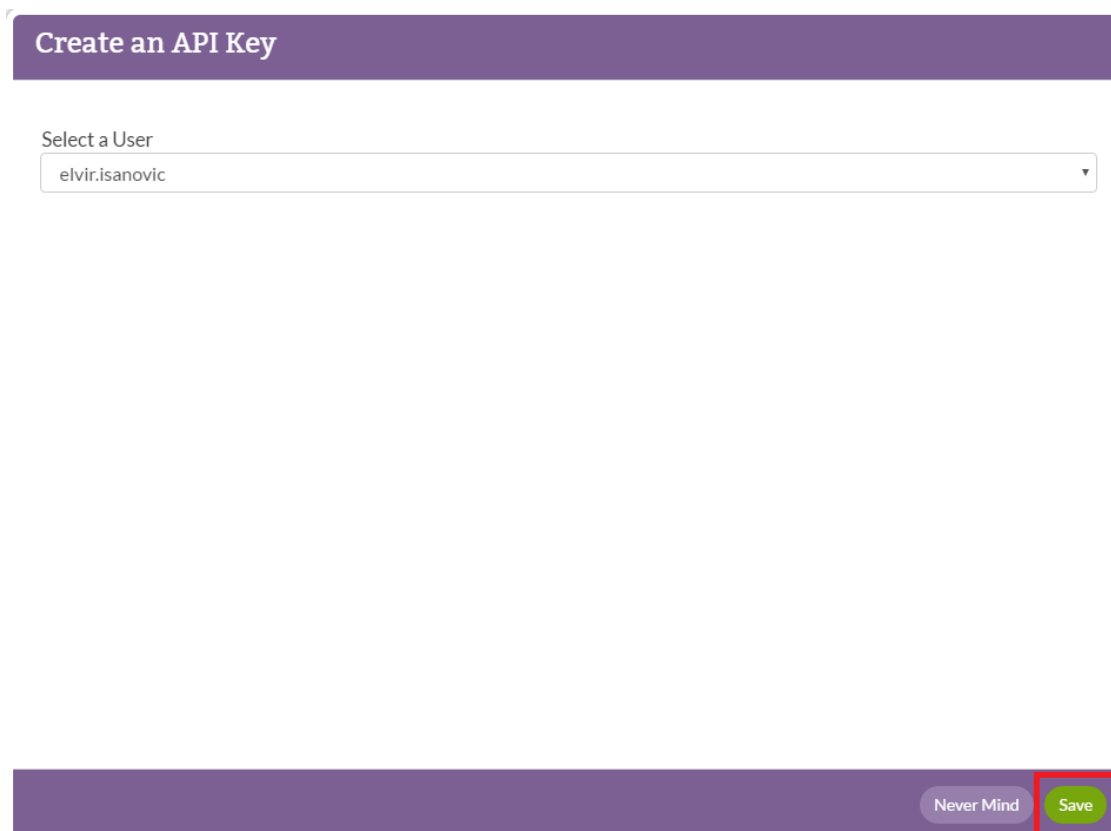
3. Click on the **Create an API Key** button



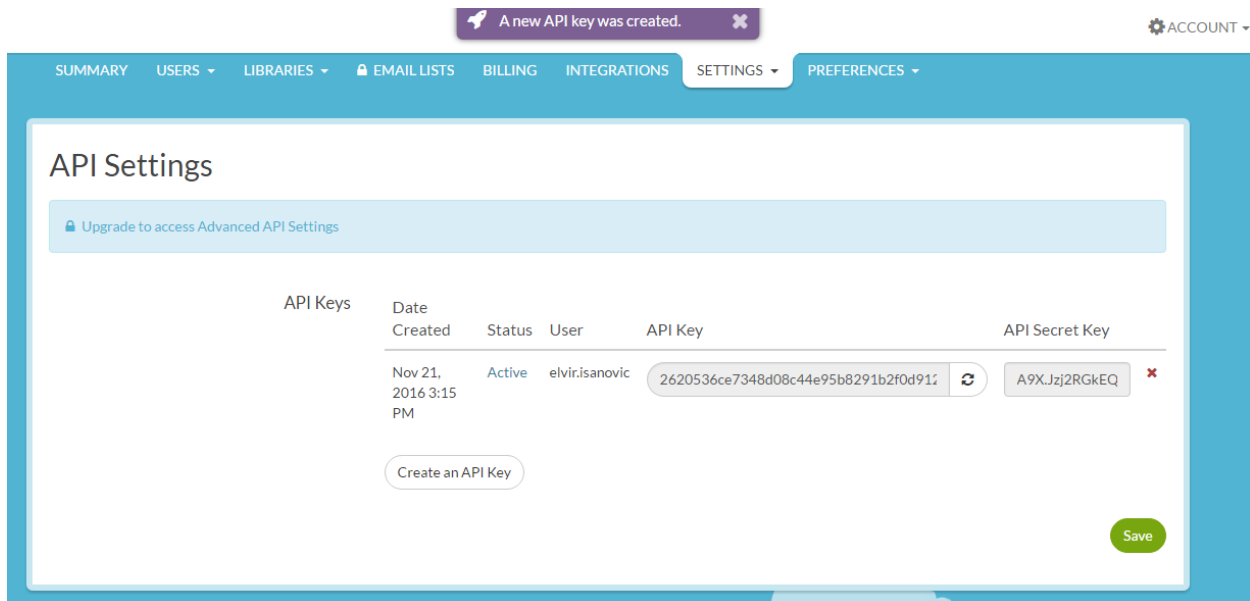
4. Select an available user from the dropdown



5. On the application screen in the lower right area, press the **Save** button



6. The API Settings page will open and all of your app settings will appear on that page. The API key and Access Token will be shown in *Credentials* section of the page.



A new API key was created.

ACCOUNT

SUMMARY USERS LIBRARIES EMAIL LISTS BILLING INTEGRATIONS **SETTINGS** PREFERENCES

## API Settings

Upgrade to access Advanced API Settings

API Keys	Date Created	Status	User	API Key	API Secret Key
	Nov 21, 2016 3:15 PM	Active	elvir.isanovic	2620536ce7348d08c44e95b8291b2f0d91z	A9X.Jzj2RGkEQ

Create an API Key

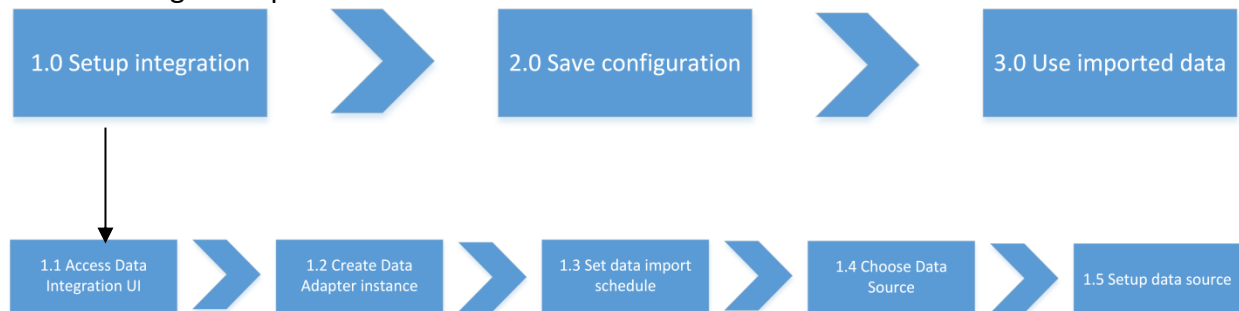
Save



## Using the System

### Process Flow

The data integration process works as follows:



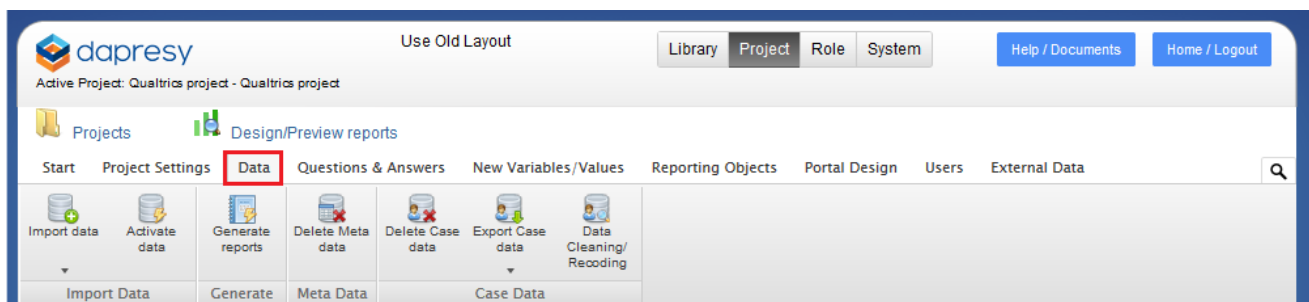
### Setup Integration

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

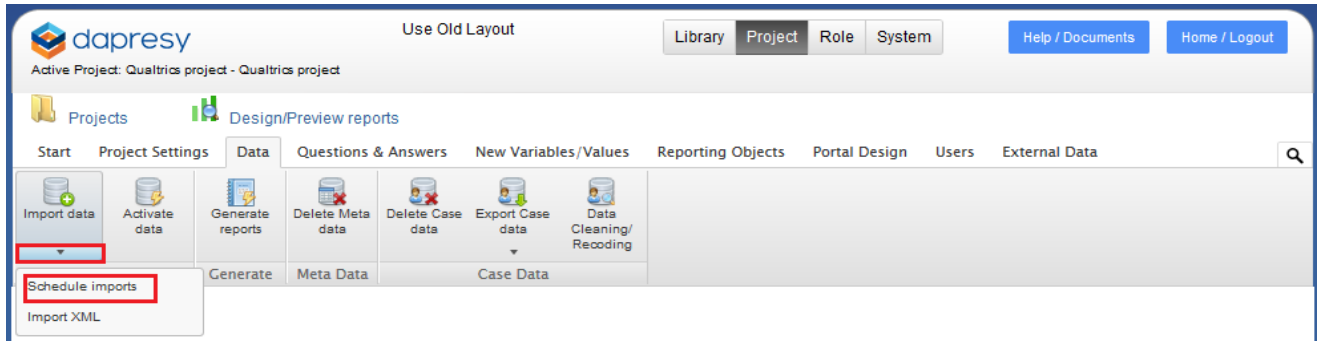
#### Task 1: Access Data Integration UI

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



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 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

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

Data source:   Retry import if unsuccessful

API key:

Access Token:

Endpoint:

Incompleted answers

Survey ID:

Survey List:

Time period:

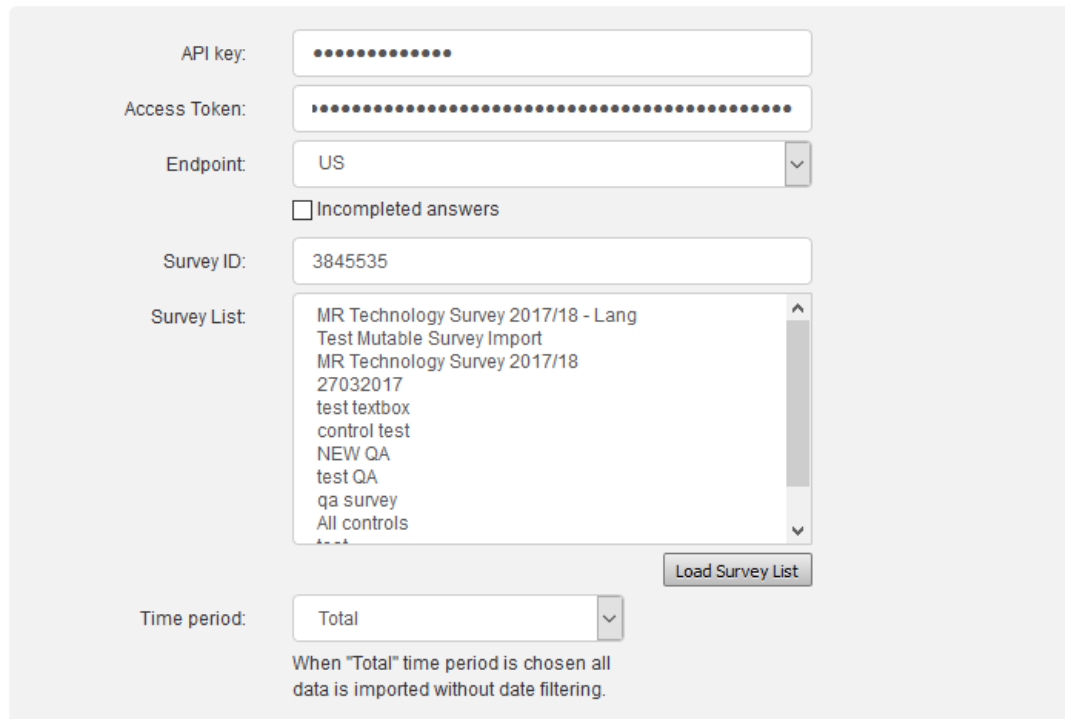
When "Total" time period is chosen all data is imported without date filtering.

### Task 5: Set up Data Source

To set up the Survey Gizmo data source, two mandatory parameters are needed: API key and Access Token. To learn how to create these, see Pre-Requirements on Page 5 of this manual. To set up the Survey Gizmo data source, simply follow these 7 steps:

1. Enter your unique **API key** from Survey Gizmo
2. Enter the **API Secret Key** for Survey Gizmo API
3. Click on the **Load survey list** button
4. The survey list will be populated with all surveys from Survey Gizmo that are linked to the provided API token

Data source:   Retry import if unsuccessful



API key:

Access Token:

Endpoint:

Incompleted answers

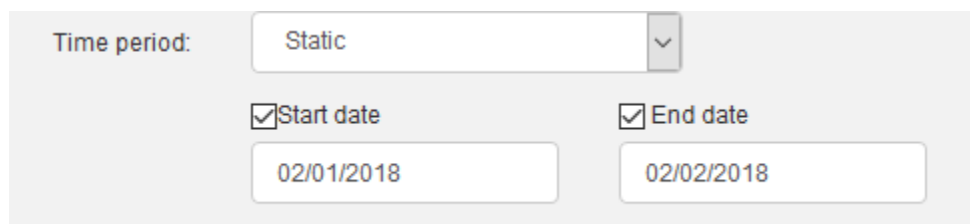
Survey ID:

Survey List:

Time period:

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

5. Select the desired survey. This will fill in the **Survey Id** field
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 the time period dropdown list



Time period:

Start date

End date

7. 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

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 Endpoints

Survey Gizmo supports only two endpoints:

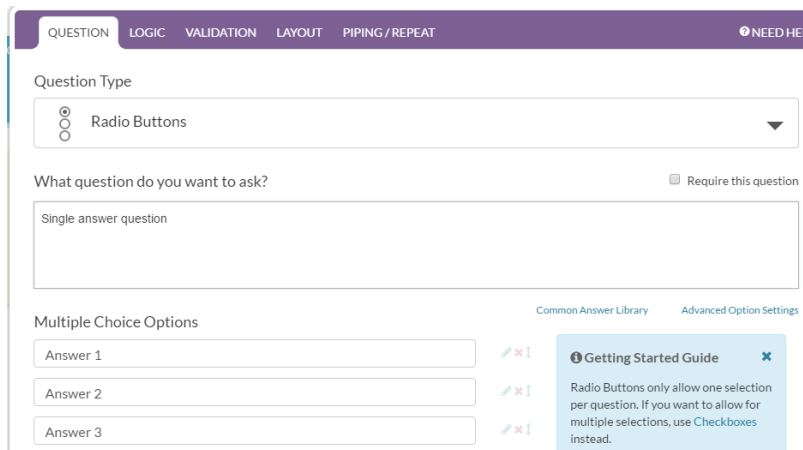
- US
- EUROPE

For every endpoint API access data is needed, which means that API key and token from US will not work on EUROPE endpoint. To select which endpoint to use please use **Endpoint** dropdown on setup page.

## Supported Survey Controls for Survey Gizmo

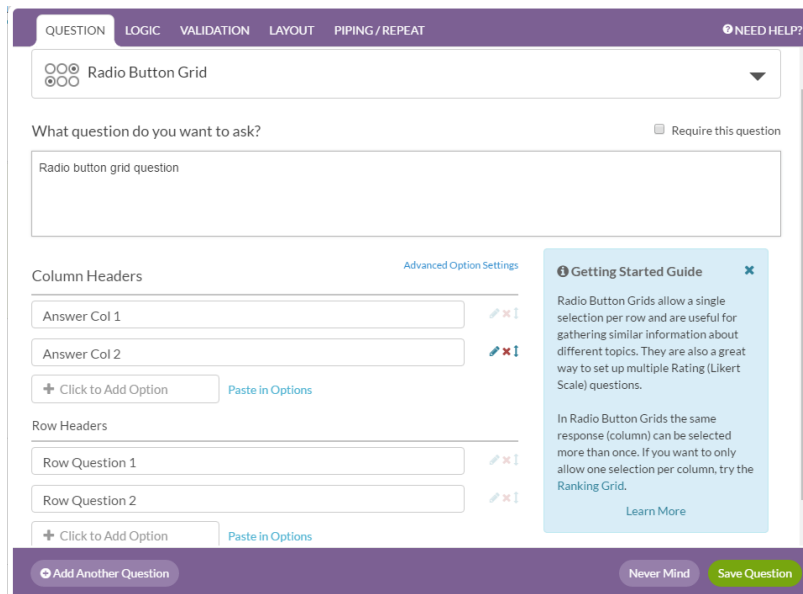
Below is the full list of survey controls currently supported by Survey Gizmo.

### 1. Radio Buttons



The screenshot shows the 'QUESTION' tab in the Survey Gizmo editor. The 'Question Type' dropdown is set to 'Radio Buttons'. Below it, there is a text input field for the question, currently containing 'Single answer question'. To the right of this field is a 'Require this question' checkbox. Underneath, there are three input fields for 'Multiple Choice Options', labeled 'Answer 1', 'Answer 2', and 'Answer 3'. Each field has edit and delete icons. A 'Getting Started Guide' pop-up is visible on the right, explaining that Radio Buttons only allow one selection per question and suggesting Checkboxes for multiple selections. The top navigation bar includes 'QUESTION', 'LOGIC', 'VALIDATION', 'LAYOUT', 'PIPING / REPEAT', and 'NEED HELP?'.

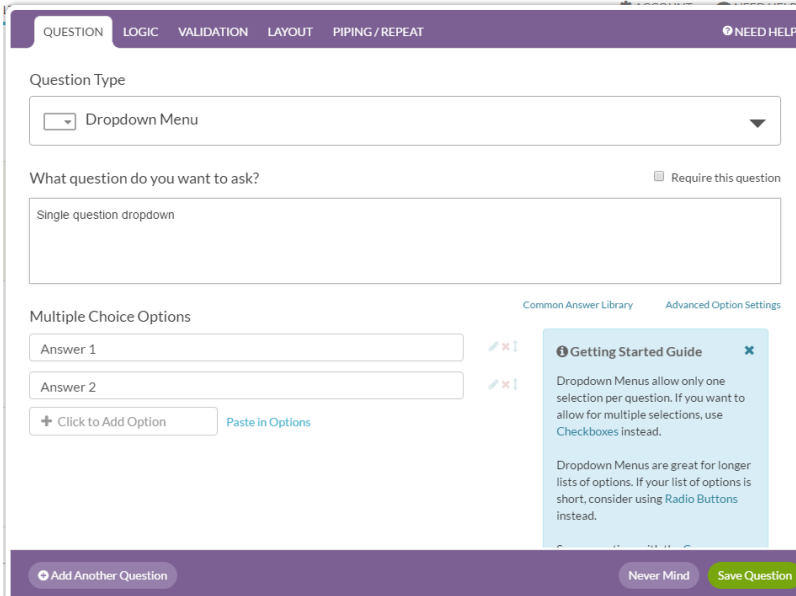
### 2. Radio button grid



The screenshot shows the 'QUESTION' tab in the Survey Gizmo editor. The 'Question Type' dropdown is set to 'Radio Button Grid'. Below it, there is a text input field for the question, currently containing 'Radio button grid question'. To the right of this field is a 'Require this question' checkbox. Underneath, there are two sections: 'Column Headers' and 'Row Headers'. Each section has two input fields (e.g., 'Answer Col 1', 'Answer Col 2' and 'Row Question 1', 'Row Question 2') with edit and delete icons, and a '+ Click to Add Option' button with a 'Paste in Options' link. A 'Getting Started Guide' pop-up is visible on the right, explaining that Radio Button Grids allow a single selection per row and are useful for gathering similar information about different topics. The bottom of the interface features three buttons: 'Add Another Question', 'Never Mind', and 'Save Question'.

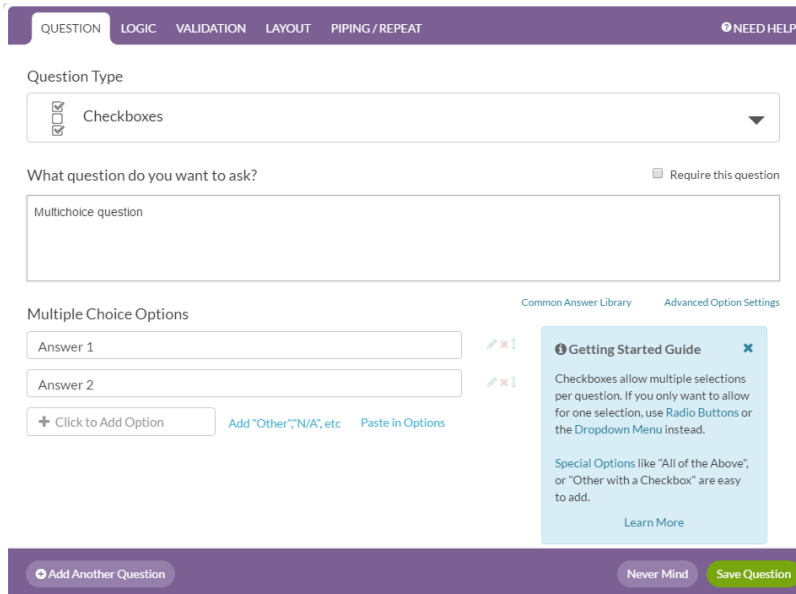


### 3. Dropdown Menu



The screenshot shows the Dapresy question editor interface. At the top, there are tabs for 'QUESTION', 'LOGIC', 'VALIDATION', 'LAYOUT', and 'PIPING / REPEAT', along with a 'NEED HELP?' link. The 'Question Type' dropdown is set to 'Dropdown Menu'. Below this, there is a text area for the question: 'What question do you want to ask?' with a 'Require this question' checkbox. The question text is 'Single question dropdown'. Underneath, there are 'Multiple Choice Options' with two input fields for 'Answer 1' and 'Answer 2', and a '+ Click to Add Option' button. A 'Paste in Options' button is also present. A 'Getting Started Guide' pop-up is visible, explaining that Dropdown Menus allow only one selection per question and are best for longer lists of options. At the bottom, there are buttons for 'Add Another Question', 'Never Mind', and 'Save Question'.

### 4. Checkboxes



The screenshot shows the Dapresy question editor interface. At the top, there are tabs for 'QUESTION', 'LOGIC', 'VALIDATION', 'LAYOUT', and 'PIPING / REPEAT', along with a 'NEED HELP?' link. The 'Question Type' dropdown is set to 'Checkboxes'. Below this, there is a text area for the question: 'What question do you want to ask?' with a 'Require this question' checkbox. The question text is 'Multichoice question'. Underneath, there are 'Multiple Choice Options' with two input fields for 'Answer 1' and 'Answer 2', and a '+ Click to Add Option' button. A 'Paste in Options' button is also present. A 'Getting Started Guide' pop-up is visible, explaining that Checkboxes allow multiple selections per question and are best for longer lists of options. At the bottom, there are buttons for 'Add Another Question', 'Never Mind', and 'Save Question'.



## 5. Textbox

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

What question do you want to ask?  Require this question

Openended short question

**Getting Started Guide** ✕

Textboxes can be used to collect single words or short lines of text. For longer entries, use the Essay question.

You can also set validation on a textbox to limit what can be entered or you can upload a list of possible answers for auto completion.

[Learn More](#)

[Add Another Question](#) [Never Mind](#) [Save Question](#)

## 6. Easy / Long Answer

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

What question do you want to ask?  Require this question

Openended essey

**Getting Started Guide** ✕

Essay questions allow multiple-line text answers and are great for additional feedback after your quantitative questions. The larger text field invites respondents to give you more information than a textbox. For single word and short sentence answers, use the Textbox.

A minimum or maximum word or character count is easy to add.

[Learn More](#)

[Add Another Question](#) [Never Mind](#) [Save Question](#)



## 7. Email

QUESTION LOGIC VALIDATION LAYOUT PIPING/REPEAT [NEED HELP?](#)

Question Type

@ Email

What question do you want to ask?  Require this question

Openended email string

**Getting Started Guide** ✕

An Email question will validate that the entry is a real email.

To help save your respondents time, contact info can be pre-populated from your contacts.

[Learn More](#)

[Add Another Question](#) [Never Mind](#) [Save Question](#)

## 8. Date

QUESTION LOGIC VALIDATION LAYOUT PIPING/REPEAT [NEED HELP?](#)

Question Type

📅 Date

What question do you want to ask?  Require this question

Date

**Getting Started Guide** ✕

The Date question provides a calendar for easier entries and validates the entry to make sure that it is a valid date.

Note: Date is collected in mm/dd/yy format. [Learn about changing formats.](#)

[Learn More](#)

## 9. Slider

QUESTION
LOGIC
VALIDATION
LAYOUT
NEED HELP?

Question Type

Slider
▼

What question do you want to ask?  Require this question

Open ended numeric - slider

Slider Settings

Left Label

Center Label

Right Label

Allow values between

Increment Value

**Getting Started Guide** ✕

The Slider is an interactive question that allows respondents to select values from a continuous range by dragging a slider.

The range, increment value, and starting value of a slider can be customized. You can also add a Left, Right and Center label.

[Learn More](#)

## 10. Star rating grid

QUESTION
ANSWERS
LOGIC
VALIDATION
LAYOUT
PIPING / REPEAT
NEED HELP?

Question Type

☆☆☆ Star Rating Grid
▼

What question do you want to ask?  Require this question

Multi choice grid

Column Headers Advanced Option Settings

✎ ✕ |

✎ ✕ |

+ Click to Add Option
Paste in Options

Row Headers

✎ ✕ |

✎ ✕ |

**Getting Started Guide** ✕

Star Rating Grids are an interactive way to ask your respondents to rate a list of items on multiple characteristics.

You can increase or decrease the default 5 stars if you wish.

[Learn More](#)

Add  "Other - Write In" Rows

## 11. Net Promoter Score

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type  
☹️ / 😊 Net Promoter Score

What question do you want to ask?  Require this question  
Promoter score - single choice

Multiple Choice Options Common Answer Library Advanced Option Settings

0  
1  
2  
3  
4  
5

**Getting Started Guide**

Net Promoter Score (NPS) categorizes respondents as either a Promoter, Passive, or Detractor and gives you a quantitative number of how likely people are to recommend you.

The answer options in an NPS are fixed and cannot be edited. The NPS score will be automatically calculated in reports.

## 12. Rating (Likert Scale)

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type  
🗳️ Rating (Likert Scale)

What question do you want to ask?  Require this question  
Rating - single choice

Multiple Choice Options Common Answer Library Advanced Option Settings

Very Dissatisfied  
Dissatisfied  
Neutral  
Satisfied  
Very Satisfied

+ Click to Add Option [Add "Other", "N/A", etc](#) [Paste in Options](#)

**Getting Started Guide**

Rating questions collect opinions along a scale like Strongly Disagree to Strongly Agree. Take advantage of our pre-built scales in the Common Answer Library.

If you need multiple Likert items, try out the Radio Button Grid.

[Learn More](#)

### 13. Ranking Grid

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

Ranking Grid

What question do you want to ask?  Require this question

Single Choice ranking grid

Multiple Choice Options [Advanced Option Settings](#)

Row Headers

Question Row 1

Question Row 2

+ Click to Add Option [Paste in Options](#)

**Getting Started Guide**

A Ranking Grid asks respondents to rank a list of items in order of preference by selecting their numeric rank from a table of radio buttons giving you a weighted score of which items are ranked highest for all responses.

### 14. Number

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

123 Number

What question do you want to ask?  Require this question

Openended numeric

**Getting Started Guide**

A Number question is a short-answer, open-text field with validation that ensures entries are numbers.

Choose from validation options such as Force Whole Number, Force Positive Numbers, and Min and/or Max values to further refine number entries.

[Learn More](#)

## 15. Percent

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT [NEED HELP?](#)

Question Type

% Percent

What question do you want to ask?  Require this question

Openended numeric - percentage

**Getting Started Guide** ✕

A Percent question is a short-answer, open-text field with validation that ensures entries are percentages.

To allow respondents to enter percentages for a list of Items that are then summed for a total, check out our [Continuous Sum](#) question.

[Learn More](#)

## 16. Checkbox Grid

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT [NEED HELP?](#)

Question Type

Checkbox Grid

What question do you want to ask?  Require this question

Multichoice grid

Column Headers [Advanced Option Settings](#)

Answer Column 1 [✎](#) [✕](#) [|](#)

Answer C0Lumn 2 [✎](#) [✕](#) [|](#)

[+](#) Click to Add Option [Paste in Options](#)

Row Headers

Question Row 1 [✎](#) [✕](#) [|](#)

Question Row 2 [✎](#) [✕](#) [|](#)

**Getting Started Guide** ✕

The Checkbox Grid allows respondents to select multiple answer options (columns) for each row in a table.

If needed, you can also require a minimum number of rows to be answered or set the minimum answers required per row.

[Learn More](#)

[Add Another Question](#) [Never Mind](#) [Save Question](#)

## 17. Dropdown Menu List

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

Dropdown Menu List

What question do you want to ask?  Require this question

Dropdown Menu List- grid

Answers [Common Answer Library](#) [Advanced Option Settings](#)

✎ ✕

✎ ✕

+ Click to Add Option [Paste in Options](#)

Row Headers

✎ ✕

✎ ✕

+ Add Another Question
Never Mind
Save Question

**Getting Started Guide** ✕

Dropdown Menu List questions allow respondents to select an option for multiple items in a list using a uniform dropdown of answers.

[Learn More](#)

## 18. Textbox list

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

Textbox List

What question do you want to ask?  Require this question

Openended Multi files

Multiple Choice Options [Common Answer Library](#) [Advanced Option Settings](#)

OPTION

✎ ✕

✎ ✕

+ Click to Add Option [Paste in Options](#)

**Getting Started Guide** ✕

A Textbox List is a list of short-answer, open-text fields with labels for each row.

Check out our documentation below for best practice tips on keeping open-text data neat and tidy.

[Learn More](#)





## 19. Slider List

**QUESTION** LOGIC VALIDATION LAYOUT [NEED HELP](#)

Question Type  
Slider List

What question do you want to ask?  Require this question  
Open ended numeric- multi

Slider Settings

Left Label  Center Label  Right Label

Allow values between  
0  100

Increment Value  
1

**Getting Started Guide** ✕

The Slider List is an interactive question that allows respondents to select values for multiple rows of items by dragging a slider along a range.

[Learn More](#)

## 20. Dropdown Menu Grid

**QUESTION** LOGIC VALIDATION LAYOUT PIPING / REPEAT [NEED HEL](#)

Question Type  
Dropdown Menu Grid

What question do you want to ask?  Require this question  
Matrix dropdown

Dropdown Menu Items

Answer Col 1  ✕ ⓘ

Answer Col 2  ✕ ⓘ

✕ ⓘ

[+ Click to Add Option](#) [Paste in Options](#)

Column Headers [Advanced Option Settings](#)

Answer 1  ✕ ⓘ

**Getting Started Guide** ✕

The Dropdown Menu Grid allows respondents to select an option for each column and row combination using a uniform dropdown of answers.

[Learn More](#)

## 21. Textbox grid

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

Textbox Grid

What question do you want to ask?  Require this question

Matrix open ended text

Column Headers Advanced Option Settings

✎ ✕ ⓘ

✎ ✕ ⓘ

+ Click to Add Option
Paste in Options

Row Headers

✎ ✕ ⓘ

✎ ✕ ⓘ

Add  "Other - Write In" Rows

**Getting Started Guide** ✕

The Textbox Grid allows respondents to enter short answers to multiple questions in a table format.

Note: Only one type of validation can be used for the entire grid.

[Learn More](#)

## 22. Semantic Differential

QUESTION LOGIC VALIDATION LAYOUT PIPING / REPEAT NEED HELP?

Question Type

Semantic Differential

What question do you want to ask?  Require this question

Matrix single choice

Column Headers Advanced Option Settings

✎ ✕ ⓘ

✎ ✕ ⓘ

+ Click to Add Option
Paste in Options

Row Headers (use format: left|right)

✎ ✕ ⓘ

✎ ✕ ⓘ

**Getting Started Guide** ✕

Semantic Differential questions are a form of rating scale designed to identify the connotative meaning of objects, words, and concepts. Similar to a Likert question, a Semantic Differential allows you to collect many opinions in one question.


[Learn More](#)



## 23. Contact Form

**QUESTION** LOGIC VALIDATION LAYOUT [NEED HELP](#)









Question Type

 Contact Form ▼

Group Description  Require this question

Contact form - open ended

Sub-Questions [Advanced Option Settings](#)

First Name	 
Last Name	 
Title	 
Company Name	 
Street Address	