Data Integration User Manual

-Survey Monkey Integration-

Revision history

Version	Date	Revision Description
1.0	5/30/2016	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 Monkey 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 Monkey 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 Monkey (https://www.surveymonkey.com/) directly into Dapresy to be used as a data source.

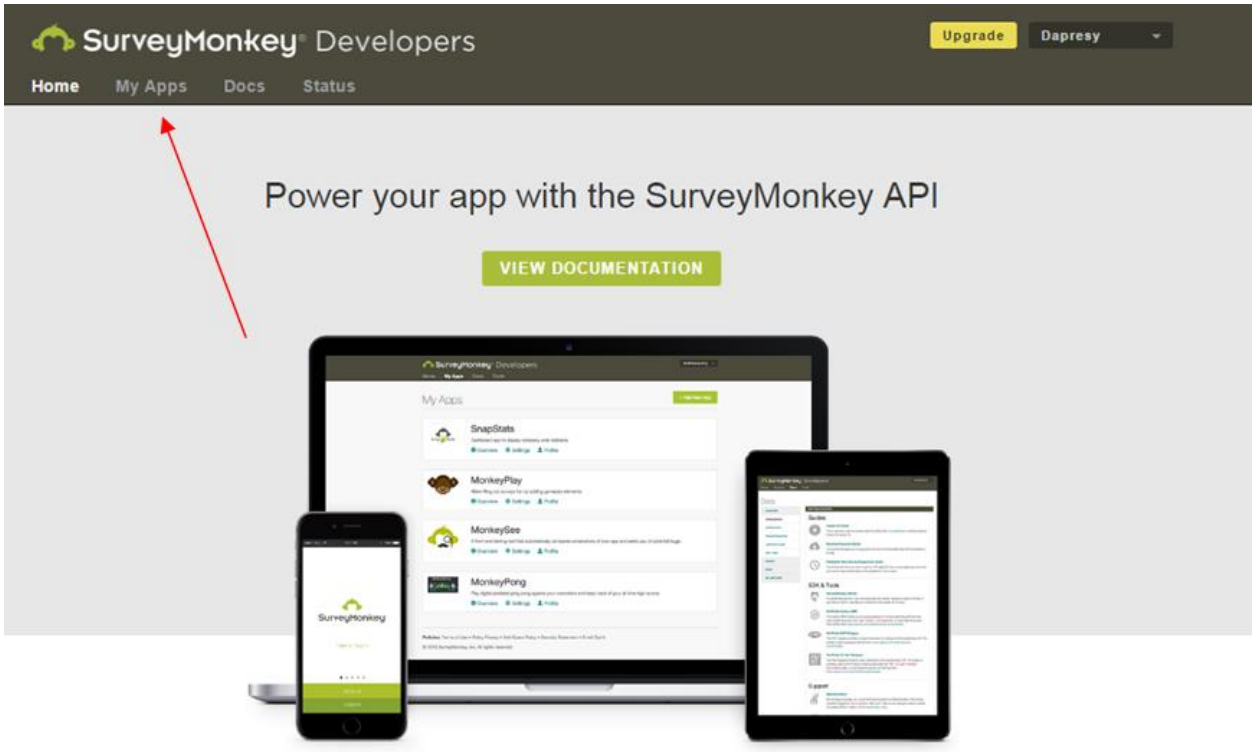
Pre-Requirements

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

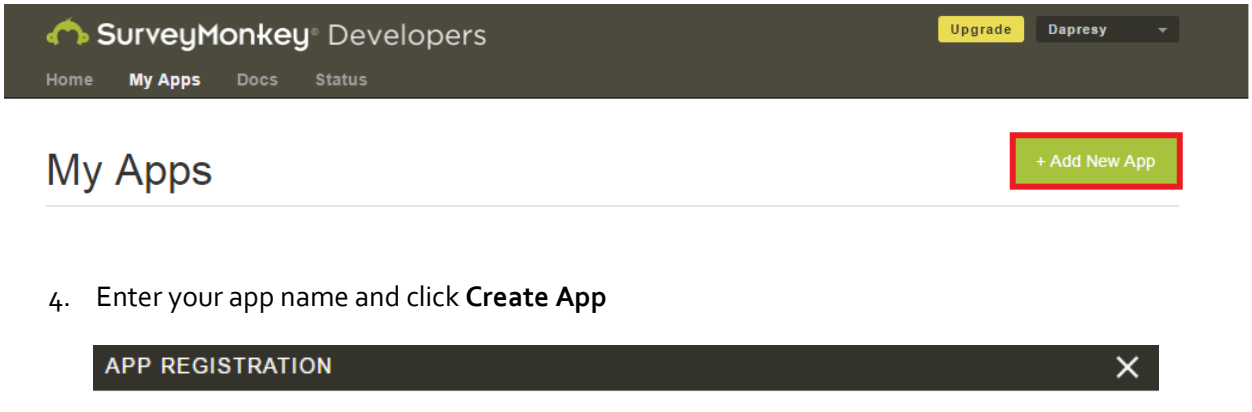
How to get API key from Survey Monkey

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

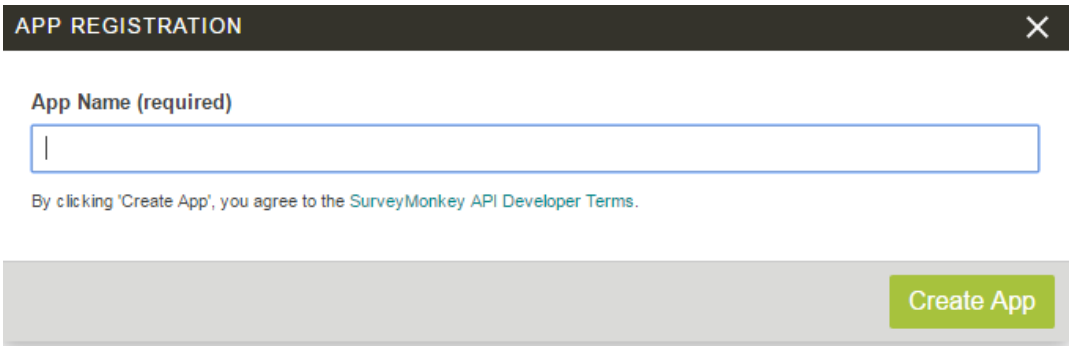
1. Log into Survey Monkey developers portal **https://developer.surveymonkey.net/** with your Survey Monkey credentials
2. Go to **My Apps** menu item



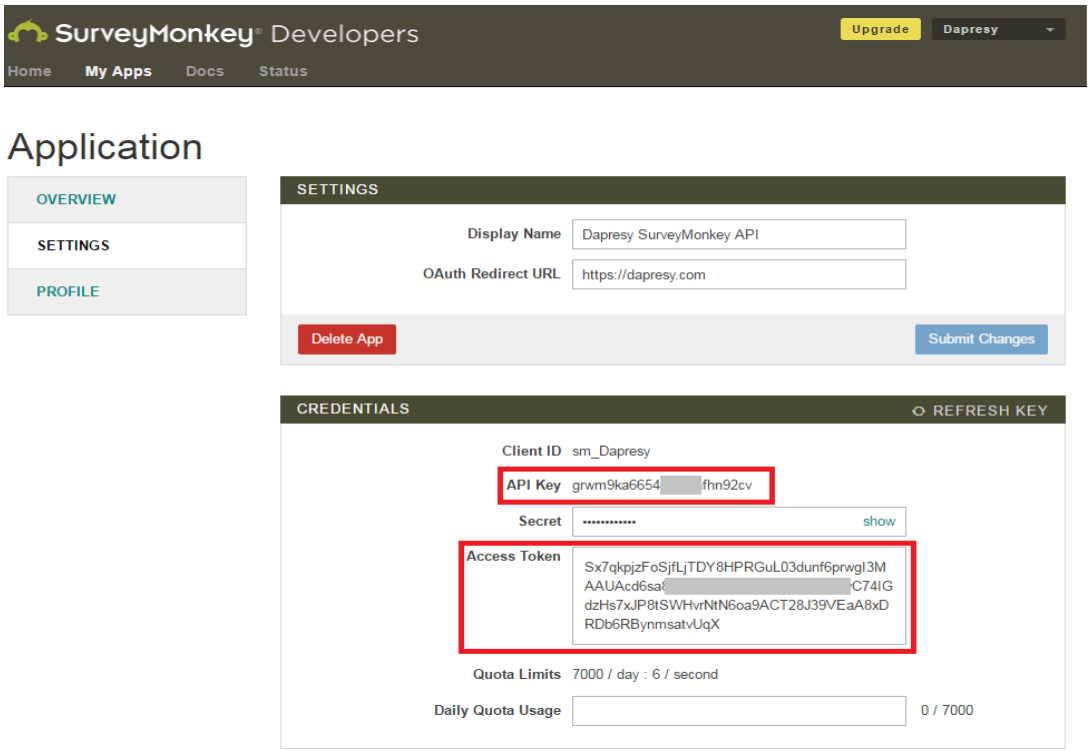
3. Click on the **Add New App** button



4. Enter your app name and click **Create App**



5. An application screen will open. Choose **Settings** on the left menu
6. The Settings page will open and all of your app settings will appear on that page

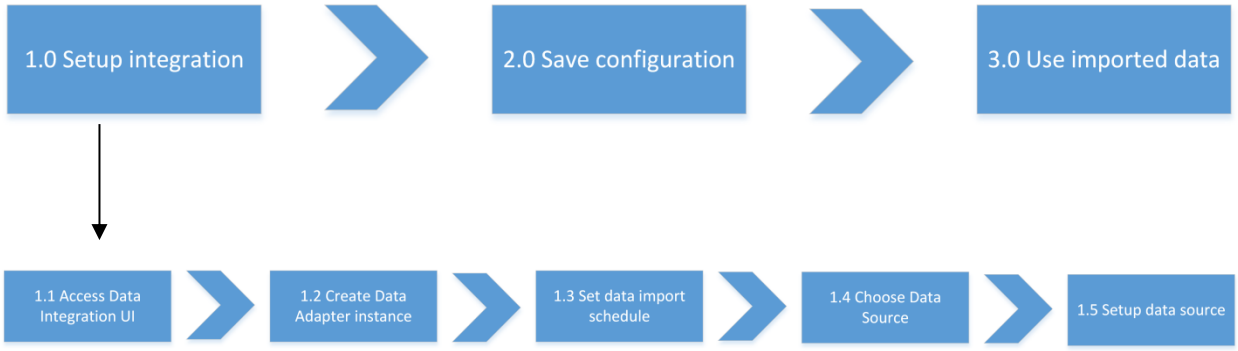


API key and Access Token will be shown in *Credentials* section of the page.

Using the System

Process Flow

The data integration process works as follows:



Setup Integration

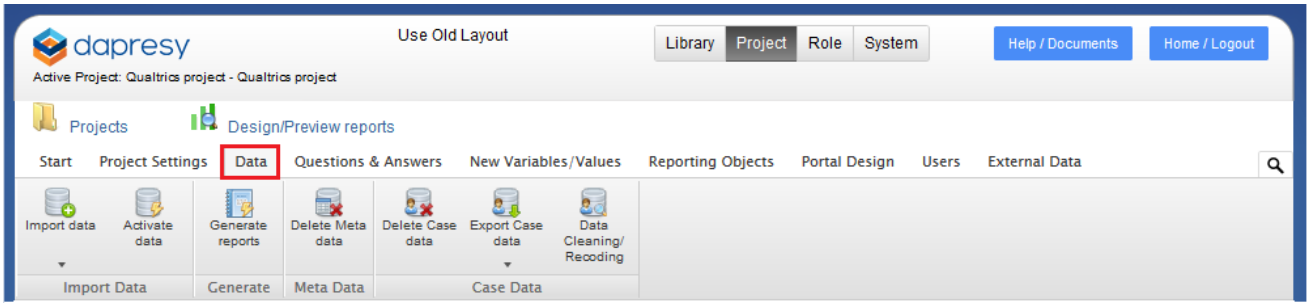
To setup a Qualtrics data source adapter, you must complete the following 5 tasks:

Task 1: Access Data Integration UI

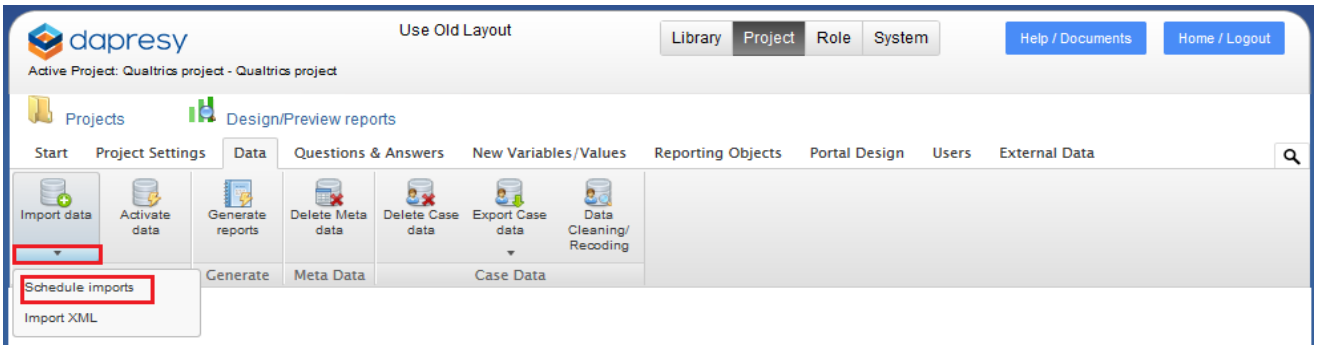
To access Data Integration UI in Dapresy, please follow these 4 steps:

1. Log into Dapresy

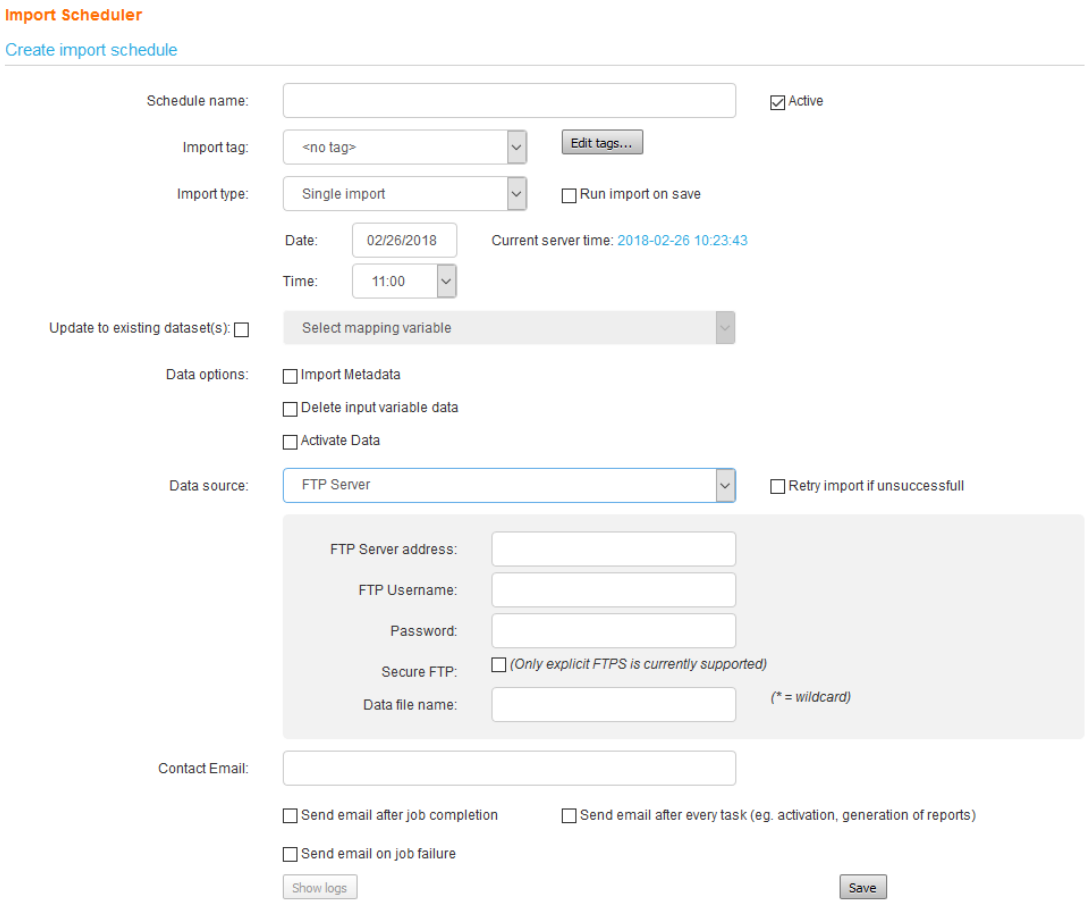
2. Enter the **Data** tab from the main menu



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.

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.

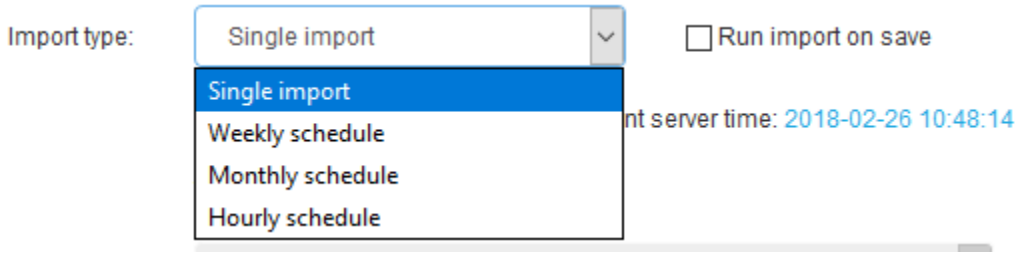
The import schedule configuration form will be cleared for new parameters and configurations. Also, if you need to delete a Data Adapter, simply select the Data Adapter you would like to delete from the **Selected import schedule** dropdown list and then click the '**Delete selected**' button.

Task 3: Set Data Import Scheduler

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.

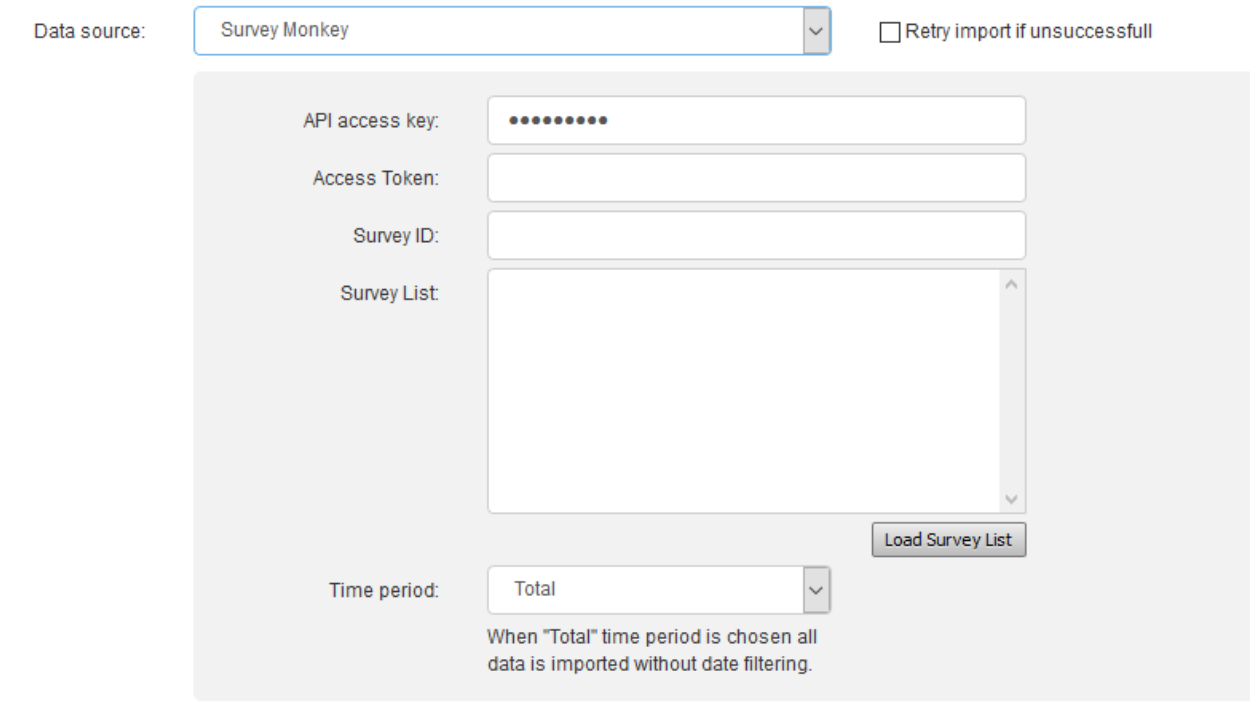


When the '**Run import on save'** checkbox is selected, then the import job will be triggered immediately after the **Save** button has been clicked. Scheduled jobs will also be saved for the time that you select.

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. This should be changed to Survey Monkey. When Survey Monkey is selected as the data source, the configuration form will be loaded on UI.

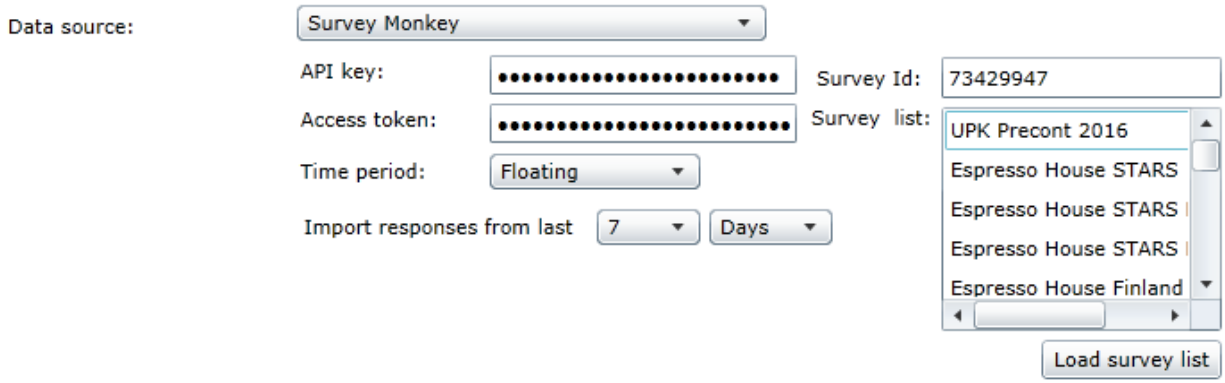


Task 5: Set up Data Source

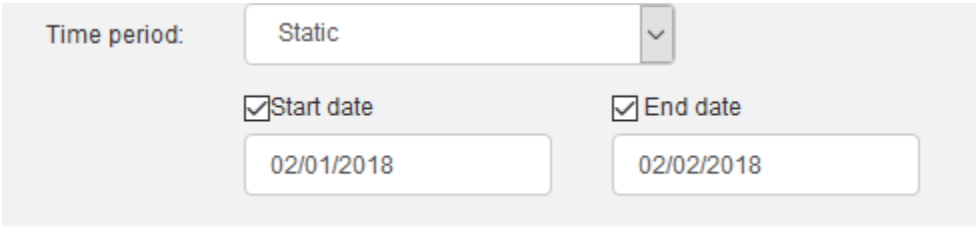
To set up the Survey Monkey data source, two mandatory parameters are needed: API key and Access Token. To learn how to create these, see Pre-Requirements on Page 5 of this manual.

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

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



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 time period dropdown.



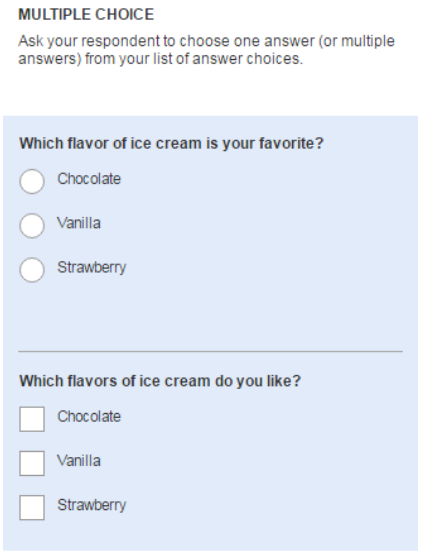
7. The Start and End date controls will appear. Simply check the Start and End date check boxes and choose the specific dates from the calendars

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

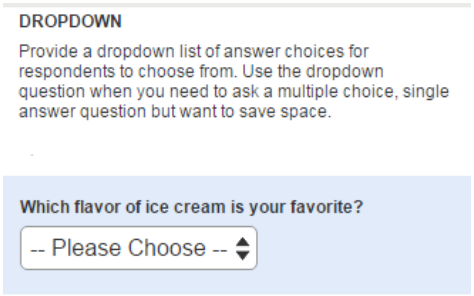
Supported Survey Controls for Survey Monkey

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

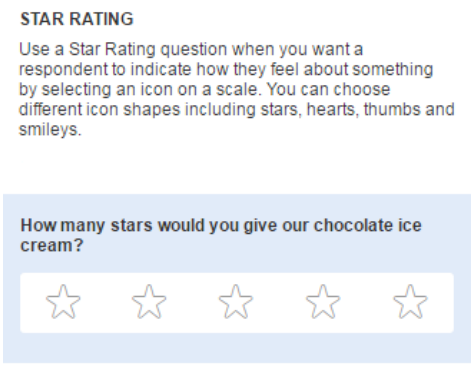
1. Multiple Choice



2. Dropdown



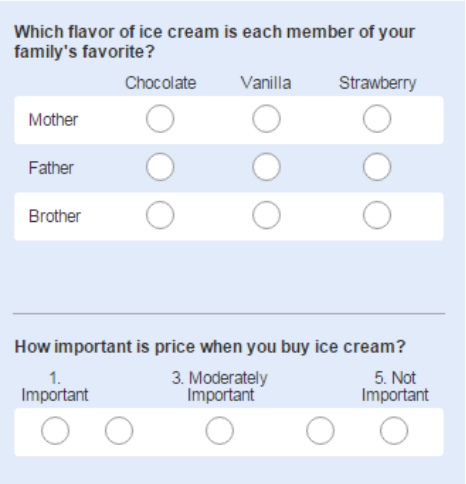
3. Star rating



4. Matrix / Rating scale

MATRIX

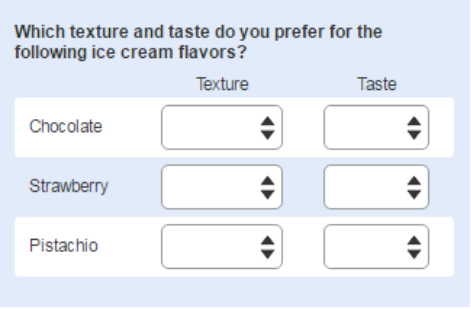
Use a matrix (grid) question if you want respondents to apply the same measurement when answering several related questions. You can set the matrix question to collect multiple answers or only one answer per row. You also have the option to turn the matrix question into a rating scale when you want to assign weights to respondents' answers.



5. Matrix of Dropdown Menus

MATRIX OF DROPDOWN MENUS

Use a matrix of drop-down menus when you want respondents to apply the same measurements for several related questions and you want to provide the list of choices. Set each question to collect an answer or just require one answer for each row.



6. Ranking

RANKING

Ask respondents to rank a list of options in the order they prefer using numeric dropdown menus.

7. Net Promoter Score

NET PROMOTER® SCORE

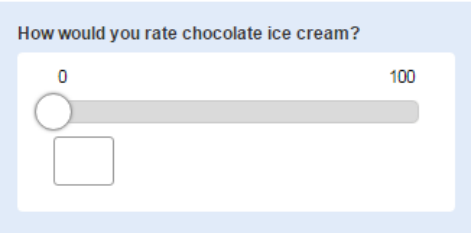
Ask your customers the Net Promoter® Score question to measure customer satisfaction with your organization, brand, product or service.

Net Promoter® Score is a trademark of Bain & Company, Fred Reichheld, and Satmetrix Systems, Inc.

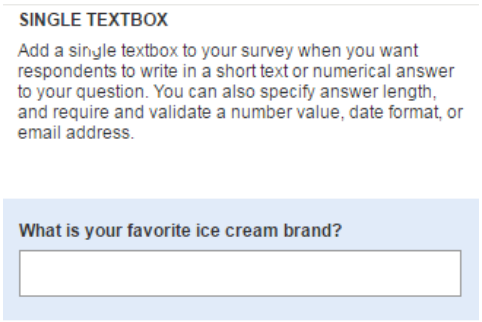
8. Slider

SLIDER

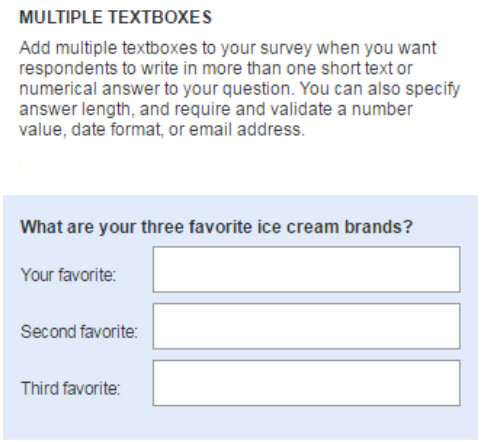
Ask respondents to rate an item or question by dragging an interactive slider.



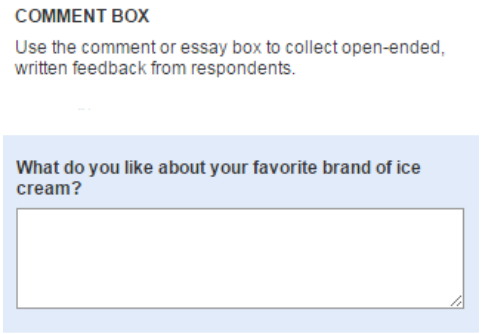
9. Single Textbox



10. Multiple Textboxes



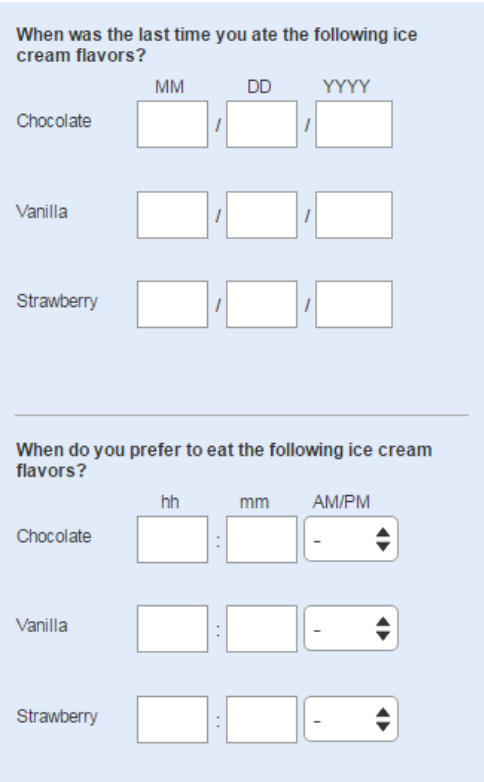
11. Comment Box



12. Date / Time

DATE / TIME

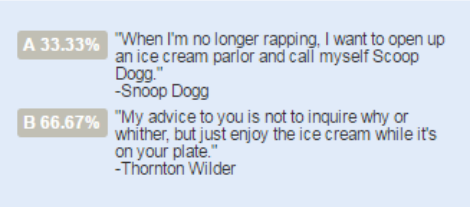
Ask respondents to enter a specific date and/or time.



13. Text A/B

TEXT A/B

Learn how respondents react to two or more different text passages. Enter the text variants you want to compare, then specify the percentage of respondents who see each message.



14. Image A/B

IMAGE A/B

Learn how respondents react to two or more different images. Provide the images to compare, then specify the percentage of respondents who see each one.

A 50%

B 50%