Data Integration User Manual

-Confirmit SPSS Integration-

Revision history

Version	Date	Revision Description
1.0	2/5/2020	Initial version
1.1	4/14/2020	Updates for scheduler details, other warnings regarding access

Table of Contents

Overview 4

Scope 4

Purpose 4

Getting Started 5

Integration Overview 5

Pre-Requirements 5

Using the System 5

Process Flow 5

Setup Integration 5

Task 1: Access Data Integration UI 5

Task 2: Create Data Adapter instance 6

Task 3: Set Data Import Scheduler 7

Task 4: Choose Data Source 7

Task 5: Set up Data Source 8

Task 6: Metadata Transformation 11

Known Issues and limitations 11

Char Precodes 11

Language Support 12

Overview

Scope

This document is a user manual for the Confirmit Data Integration. It contains all 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 Confirmit Data Integration and how to use it in the Dapresy system.

Getting Started

Integration Overview

This API allows you to export survey data from Confirmit directly into Dapresy to be used as a scheduled data source.

Pre-Requirements

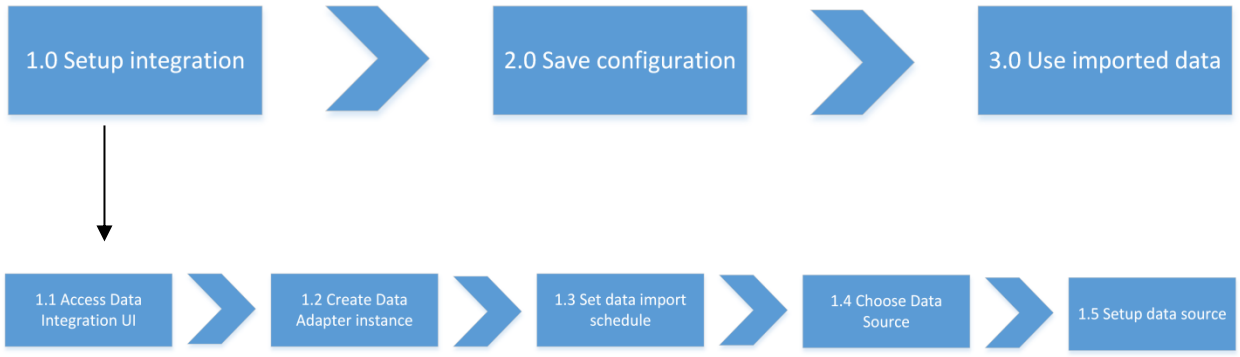
IMPORTANT!

In order to use the Confirmit Data Integration, you will need to have Confirmit account with the appropriate permissions to use their data API. This will be provided by Confirmit support. That is required for the data to be imported successfully.

Using the System

Process Flow

The data integration process works like below:



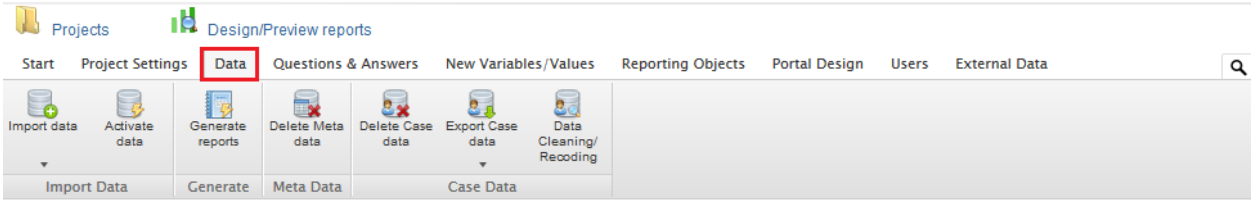
Setup Integration

To setup the Confirmit data source adapter, you must complete the following 6 tasks:

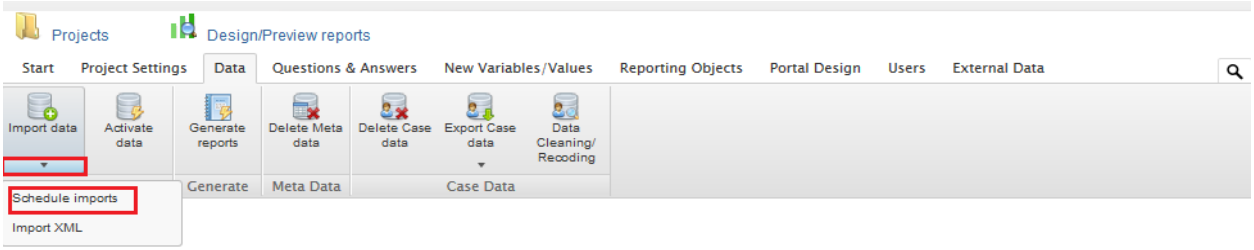
Task 1: Access Data Integration UI

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

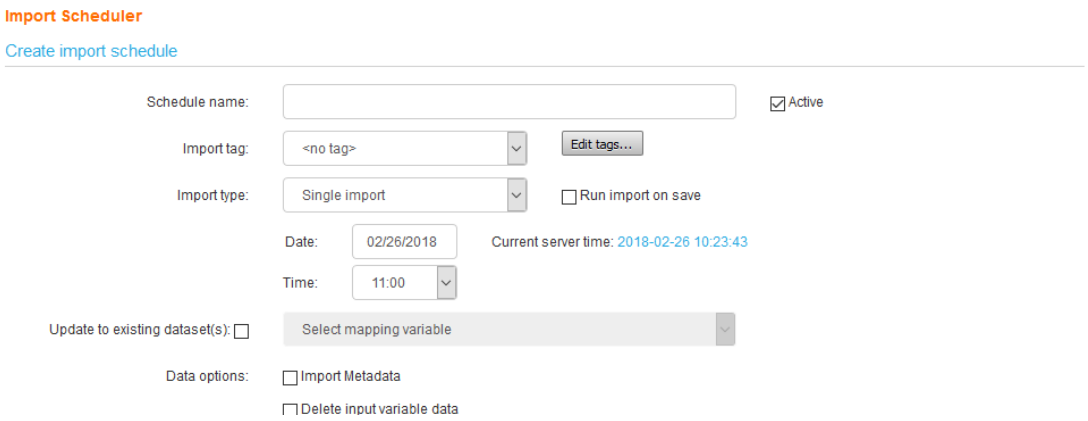
1. Log into Dapresy, select or create project as normal
2. Select the **Data** tab from the main menu



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



Data Integration UI



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 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.

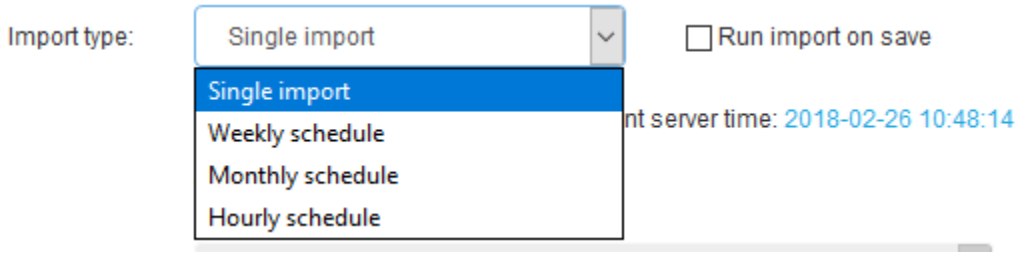
The import schedule configuration form will be cleared for new parameters and configurations. Also, if you need to delete a Data Adapter, simply select the Data Adapter you would like to delete from the **Selected import schedule** dropdown list and then click the '**Delete selected**' button.

Task 3: Set Data Import Scheduler

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.

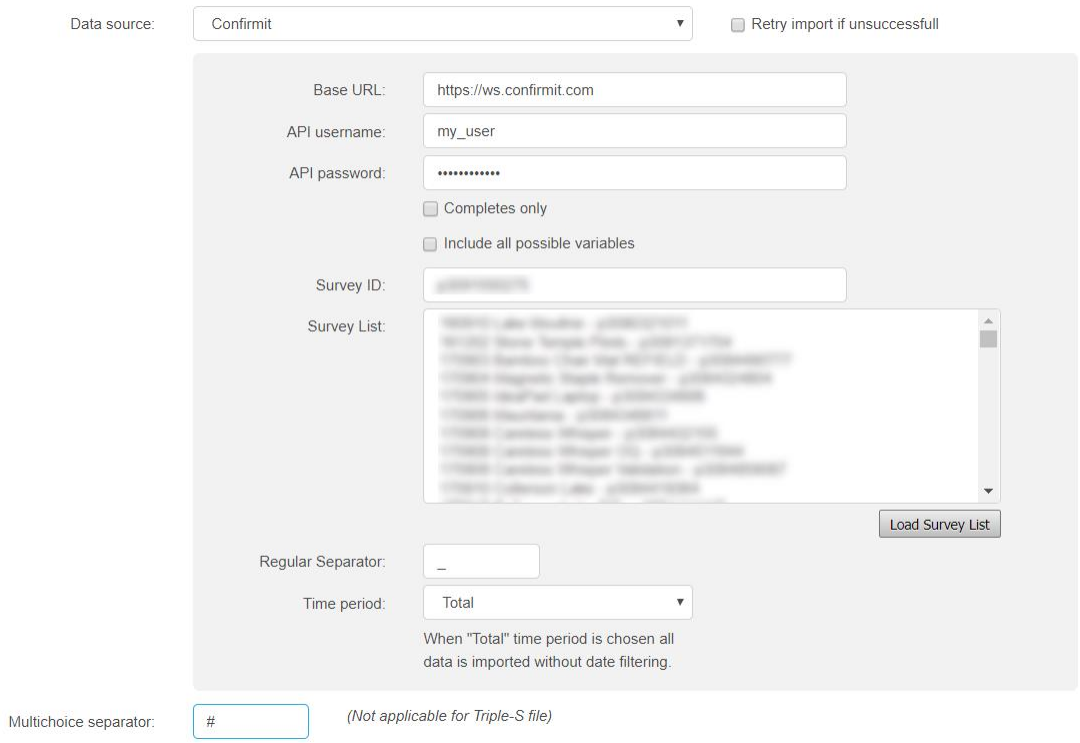


When the '**Run import on save'** checkbox is selected, then the import job will be triggered immediately after the **Save** button has been clicked. Scheduled jobs will also be saved for the time that you select.

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 **Confirmit**. When Confirmit 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 Confirmit data source you require base URL for your Confirmit instance, the username and password of the account, and the Project ID.

IMPORTANT! The Confirmit account you are using, needs to have correct API permissions and permissions for the specified survey in order for job to be executed correctly.

Enter the base URL and API location of the Confirmit API
examples:
https://ws.confirmit.com – used in US
https://ws.euro.confirmit.com – used in Europe
https://ws.nordic.confirmit.com - used for test
etc.
NB Only the server is required, nothing after ".com" and it is always https.
Enter the username and password for the account accessing the API. Click on the **Load survey list** button. The survey list will be populated with all surveys from the Confirmit server that the account used has access permission. Select the desired survey, and the **Survey Id** field will be populated.

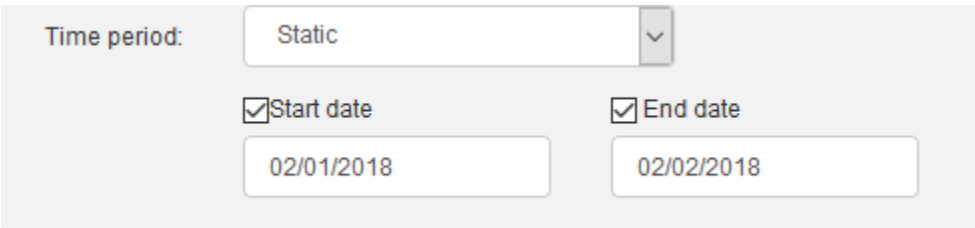
Set desired regular and multiple-choice separator characters. The multichoice separator allows identification of multi choice questions in SPSS.

Confirmit Code	Variable type	Regular Separator	Multi choice separator	Result in Imported SPSS	Dapresy Code
q1	single	none	n/a	q1	q1
q1	single	_	n/a	q1	q1
q1	single	#	n/a	q1	q1
q1_1	single	none	n/a	q11	q11
q1_1	single	_	n/a	q1_1	q1_1
q1_1	single	#	n/a	q1#1	q1#1
q2	multi	none	#	q2#1, q2#2 etc.	q2
q2	multi	_	#	q2#1, q2#2 etc.	q2
q2_1	multi	none	#	q21#1, q21#2 etc.	q21
q2_1	multi	_	#	q2_1#1, q2_1#2 etc.	q2_1

If Completes only is selected the download is filtered on status for completed respondents only.

Include all possible variables creates flattened loops based on all combinations based on the survey metadata, if this is not selected the loops are only flattened to represent the case data present in the specific download.

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.

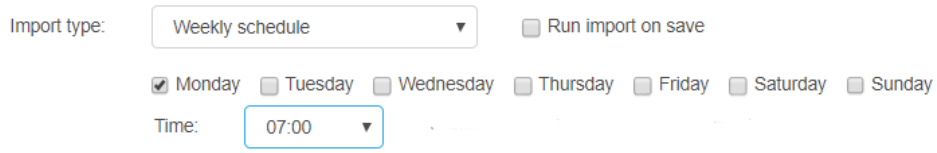


The Start and End date controls will appear. Simply check the Start and End date check boxes and choose the specific dates from the calendars.

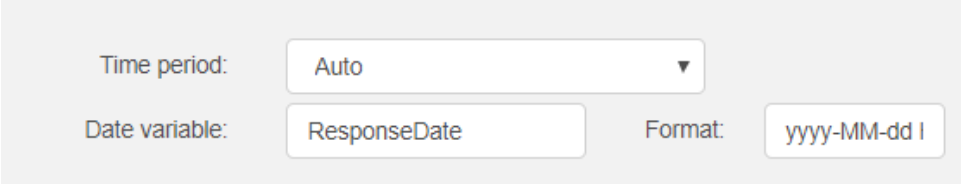
If you want the task to run regularly and take the data for each complete day since the last run select Auto.

E.G. I want to take all data for the previous week and run the job every Monday.
The interview date is stored in the field ResponseDate as "2020-06-01 12:43:00"

I create a weekly task for Mondays:



Then set import to Auto, and set date format to yyyy-MM-dd HH:mm:ss



Every Monday this will import the new respondents from the previous Monday to Sunday inclusive.

Task 6: Metadata Transformation

The final step is to create the metadata definition. Typically, this is used for eliminating unwanted variables (e.g. system information such as browser version or screen resolution), setting weight or date variables, additional grouping to create multiple choice questions from relevant sets of single choice questions, search and replace updates on codes and texts, fixing answer texts in multiple choice questions, fix any errors on import etc.

Please refer to general Dapresy documentation for further details on the metadata transformation function.

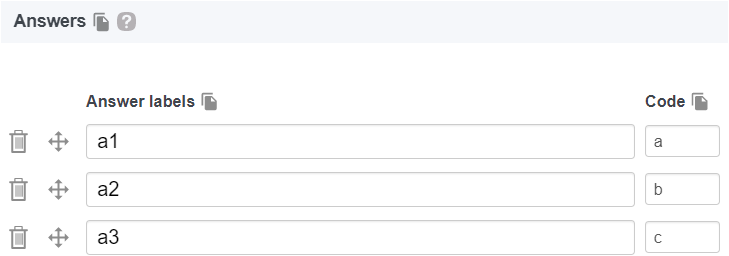
After completing these steps, the data adapter will be configured ready to use. The last step is to click '**Save**' at the end of the Import scheduler UI.

Known Issues and limitations

Char Precodes

If character based precodes are used in the Confirmit survey for answers, these will be converted to numeric values automatically.

This question in Confirmit:



Will be imported with these answer id's:

STATUS	ANSWER TEXT	ANSWER ID
	a1	1
	a2	2
	a3	3

These translations are created and persisted per project in the system, so in this case code "a" will always be loaded as answer id = 1 for this question.

Language Support

Default language will be imported. Future development will support choosing language and extracting additional languages.