



Data Integration User Manual

-Confirmit Integration V3-

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Overview

Scope

This document is a user manual for the Confirmit Data Integration using the Data Import API. 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 V3 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. The integration uses the Confirmit Public REST Survey Data API and the Public REST Hub API to read data and the Dapresy Data Import REST API to load the data.

Supported Survey Types

Both regular Horizons surveys and auto mapped surveys from Smart Hub can be imported. In the survey list there is a text identifier for type, either "survey" or "

Pre-Requirements

IMPORTANT – USER CREDENTIALS!

To use the Confirmit Data Integration, you will need to have Confirmit account with the appropriate permissions to use the Confirmit survey data API. This will be provided by our Confirmit support. This is required for the data to be imported successfully, the integration uses the client Id and secret.

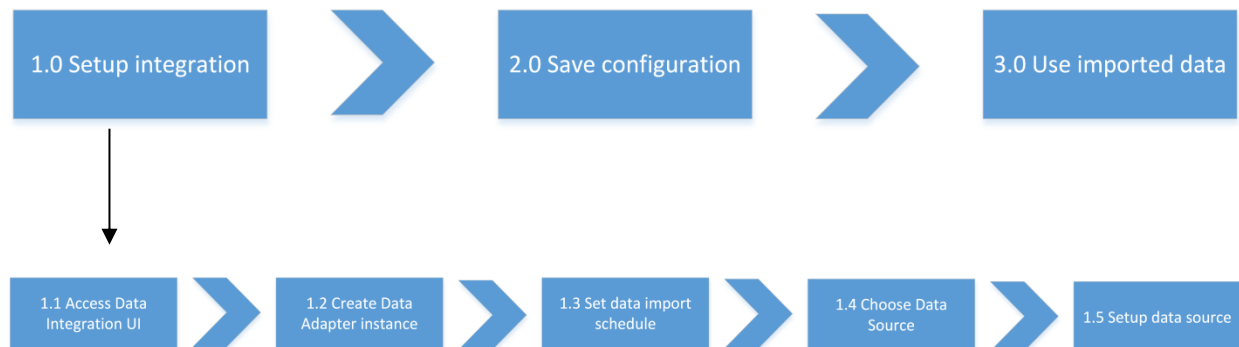
IMPORTANT – COMPATIBILITY WITH CONFIRMIT V1, V2 INTEGRATIONS AND FILE BASED IMPORTS!

The Confirmit v3 integration is not directly compatible with the earlier Confirmit Horizons integrations or other sources. The metadata will not match, as the answer values are derived differently, it is therefore not possible to start using the v3 integration in projects that have previously used other data sources without large modifications to the metadata or by using extensive mapping in the MDT during import.

Using the System

Process Flow

The data integration process works like below:



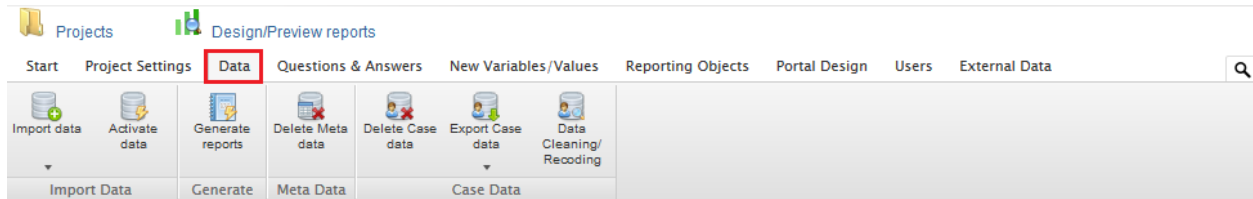
Setup Integration

To setup the Confirmit V3 data source adapter, you must complete the following 6 tasks:

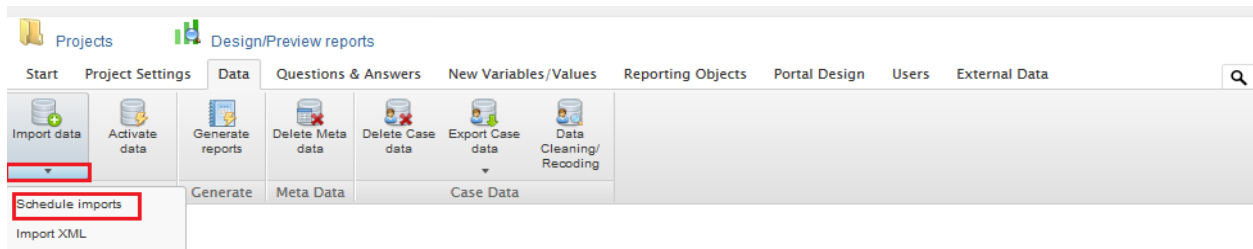
Task 1: Access Data Integration UI

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 **Schedule imports** from dropdown menu



Data Integration UI

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

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.

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:

My first job



Create new

Delete selected

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.

Import type: On demand

Batch type: Single import

Data options: Weekly schedule

Monthly schedule

Hourly schedule

On demand

☐ Run import on save

☐ activate excluded metadata

☐ depend dataset to active data

☐ activate Latest 1 datasets


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: FTP Server 

By default, the data source is set to the FTP Server, but this should be changed to **Confirmit V3**. When Confirmit V3 is selected as the data source, then the configuration form will be loaded on UI.


Data source: Confirmit v3 

Credentials: User provided 

Base URL: https://ws.us.confirmit.com 

Client ID: Update

Client secret: Update

Survey ID: 

Survey List:

Load Survey List

Task 5: Set up Data Source

To set up the Confirmit data source you require base URL for your Confirmit instance, the Client ID and secret of the account, and the Project ID.

IMPORTANT! The Confirmit account you are using, needs to have correct API permissions and access rights for the specified survey for the 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 Client ID and Client secret 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. (NB only the first 1000 surveys are loaded, if you know the ID of the survey paste it directly into the Survey ID field). If this step fails it is probably an issue with the credentials or server address, double check settings.

Choose the survey you want, or just type in the id (the pXXXXXX number) if you know it already.

By default, there is a filter on Status for Completes only, to change this use the filter section to choose filters and variables. Here we are including incompletes as well:

The screenshot shows a configuration interface with two main sections: 'Variables' and 'Values'.
The 'Variables' section on the left contains a list box with the following items: 'Services_Subscribed -- multiCho', 'spc -- text', 'spc_comp -- text', 'start_time -- dateTime', 'start_time_txt -- text', 'status -- singleChoice' (which is highlighted), 'supplier_id -- text', and 'T 20 09 COM0001 13 E sing'. Below the list are 'Load' and 'Include' buttons.
The 'Values' section on the right contains a list box with the following items: 'complete - Complete', 'error - Error', 'incomplete - Incomplete' (which is highlighted), 'quotafull - Quota Full', and 'screened - Screened'. Below the list is an 'Apply' button.
Below these sections are two text input fields. The first is labeled 'Include variables:' and is currently empty, with a 'Clear' button to its right. The second is labeled 'Filter expression:' and contains the text 'status='complete','incomplete';', with a 'Clear' button to its right.

First load all variables that belong to selected survey by clicking “Load” button. Select the variables to import with the Include button (default is all variables.) Create filters by double-clicking the variable, choosing answers and clicking “Apply”. Not all variable types are supported for filtering, for instance dates are not supported. User is prompted with warning if he double-clicks unsupported variable type from variable list. Multiple selections are possible by holding the CTRL key and selecting values from lists with left mouse click. The text boxes for variables and filters can be edited directly but this is not recommended as errors in the filter text will cause errors on import. If the user double-clicks open ended variable from variable list, new textbox will appear. Value for filter should be entered inside double quotes and after that “Apply” button should be hit.

If your project requires a hierarchy from the Confirmit Hierarchy definition module select the hierarchy filter in project settings, but **not** the “Derive” option.

HIERARCHICAL FILTER

☒ Use Hierarchical Filters

☐ Derive Hierarchical Filter structure from data

Correct Project Settings for using a Confirmit Hierarchy

Then the hierarchy settings section will be visible:

☒ Include hierarchy variable (Once imported, this must be included in all future imports)

Hierarchy ID:

☒ Add top level node to hierarchy

Top level node name:

Enter the name of the variable that holds the hierarchy in the survey and optionally add a top-level node. This is typically used to identify the wave for the hierarchy. This would be used, for instance, when mapping nodes between waves to present a single set of nodes for the end users.

NB This will update the hierarchy structure directly when the scheduled task is run. As noted in the screenshot, this must always be imported in data downloads once checked in.

Importing Weight Models from Conformat Horizons

☐ Import weight models from Horizons, if available

If the above box is checked in the import will load weight models from Horizons. All types of weights are supported apart from "Survey Question". When this option is used an additional import batch will be added which contains the per respondent weights for each weight variable. If the survey contains a weight model named "weight" this will replace the default weight in Dapresy.

Choose the 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.

Time period:

☒ Start date ☒ End date

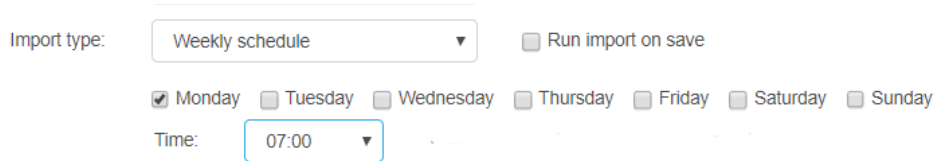
The Start and End date controls will appear. Simply check the Start and End date check boxes and choose the specific dates from the calendars.

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:

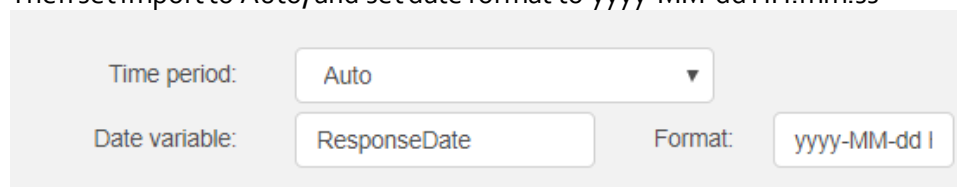


Import type: Weekly schedule ☐ Run import on save

☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Time: 07:00

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



Time period: Auto

Date variable: ResponseDate Format: 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 last 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), 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.

Stacked Data Support

Any stacked data will be loaded automatically. Activation will include stacked data. Any logic for last x batches will include stacked data associated with the regular data batches. The number of main data batches will match the number of batches selected for activation. If you have one main batch and three stacked data batches in each import, selecting to activate last 2 batches will result in 2 main data batches and 6 stacked data batches (2 * 3) being activated.

Iterators, the keys for the loop, are identified to be used in Dapresy.

IMPORTANT - Answer ID mapping: The integration will use original Confirmit integer codes, and hash alphanumeric codes (that is create a numeric value from any alphanumeric values) and numeric values greater than the largest supported number for Dapresy Answer Id's which is 2,147,483,647.

RespondentID - variable 'responseId' is used as RespondentID by default on imports. This can be changed with the MDT function. If the MDT is used to add a new RespondentID, the existing RespondentID must be inactivated.

	RespondentIDVirtual	Respondent ID	0
	RespondentID	responseid	202
	respid	respid	202

This function will create a new RespondentId which will not clash with existing RespondentId in the project, which allows for merging from various sources.

ResponseDate – by default 'interview_end' variable is used as ResponseDate on imports. If it's empty, that 'interview_start' is taken, and if this one is empty too, current date will be used. User can change this with MDT.