Data Integration User Manual

-Confirmit Integration V2-

Revision history

Version	Date	Revision Description
1.0	04/15/2020	Initial version
1.1	04/21/2020	Updated name

Table of Contents

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 V2 and how to use it in the Dapresy system.

Status

At the time of writing (April 2020) the integration is available in the live systems but with a Beta status.

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 WCF Data API to read data and the Dapresy Data Import REST API to load the data.

Pre-Requirements

IMPORTANT – USER CREDENTIALS!

In order to use the Confirmit Data Integration, you will need to have Confirmit account with the appropriate permissions to use the Confirmit data API. This will be provided by our Confirmit support. That is required for the data to be imported successfully. It is recommended to use a dedicated account for this, so that it is not affected by password changes etc.
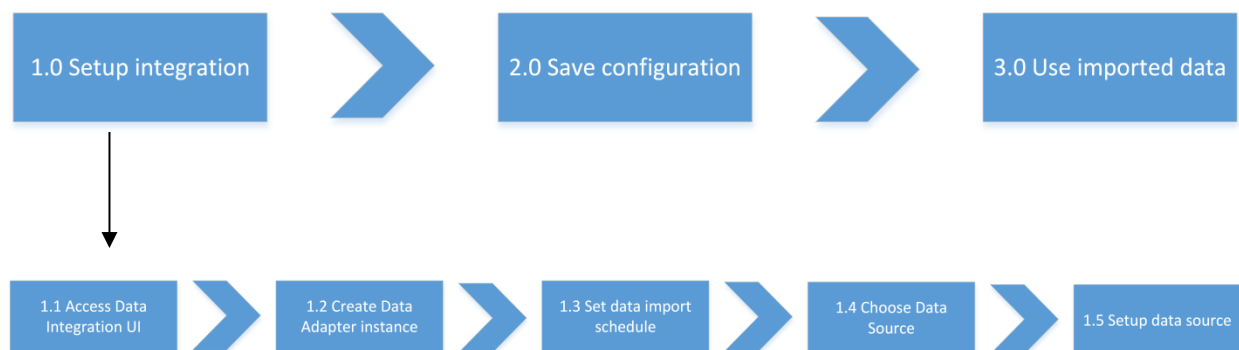
IMPORTANT – COMPATIBILITY WITH CONFIRMIT V1 INTEGRATION!

The Confirmit v2 integration is not directly compatible with the Confirmit v1 integration. The metadata will not be a good match, it is therefore not possible to start using the v2 integration in projects that have previously used V1.

Using the System

Process Flow

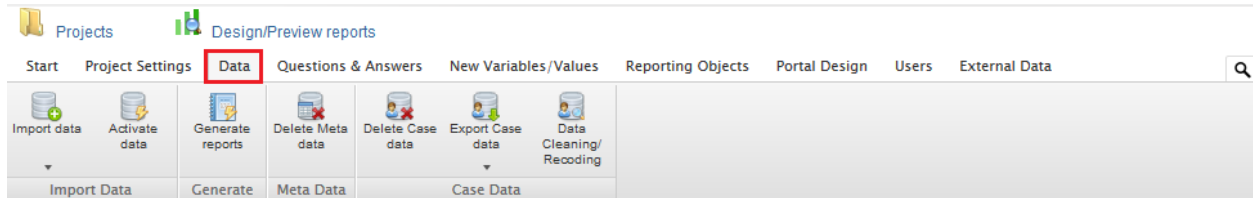The data integration process works like below:

Setup Integration

To setup the Confirmit V2 data source adapter, you must complete the following 6 tasks:
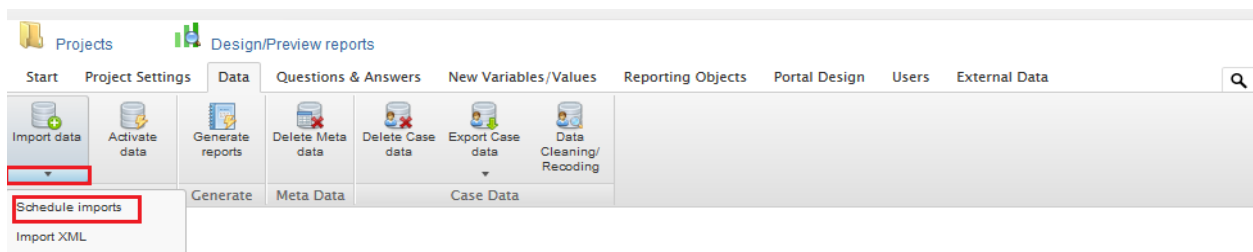
Task 1: Access Data Integration UI

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 V2**. When Confirmit V2 is selected as the data source, then the configuration form will be loaded on UI.

NB At the time of writing the integration is in a Beta status.

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 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

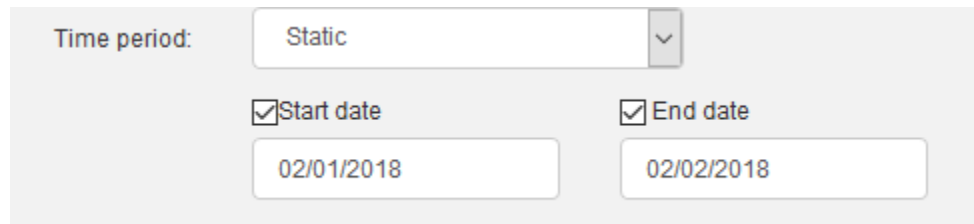https://ws.nordic.confirmit.com - used for test

etc.

NB Only the server is required, nothing after ".com" and it is always https.

Enter the 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. NB if you already know the id of the survey, it can be typed in directly, it is not necessary to fill the survey list.

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

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.
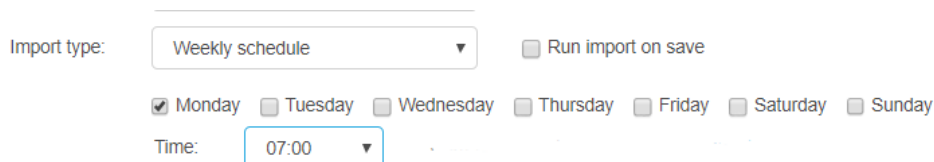

The Start and End date controls will appear. Simply check the Start and End date check boxes and choose the specific dates from the calendars.

If you want the task to run regularly and take the data for each complete day since the last run select Auto.
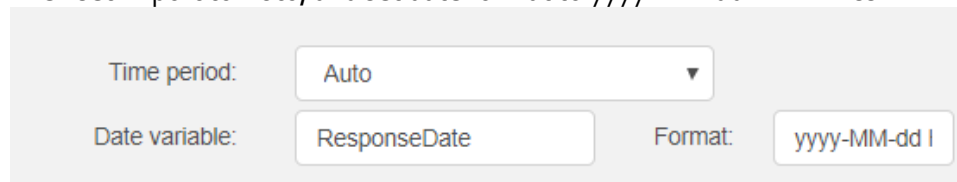
E.G. I want to take all data for the previous week and run the job every Monday.

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), 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.