



Data Integration User Manual

-MWM² Integration-

Revision history

Version	Date	Revision Description
1.0	11/28/2017	Initial version
1.1	02/26/2018	Document modified for new UI

Contents

Overview	4
Scope	4
Purpose	4
Getting Started.....	5
Pre-Requirements	5
Using the System.....	6
Setup Integration	6
Task 1: Access Data Integration UI.....	6
Task 2: Create a Data Adapter	8
Task 3: Set Data Import Scheduler.....	9
Task 4: Choose Data Source	10
Task 5: Set up Data Source.....	11
Response status filter.....	15

Overview

Scope

This document is a user manual for MWM² API Data Integration. It contains all relevant information for this integration that has been implemented in the Dapresy system.

Purpose

The purpose of this document is to provide an overview of MWM² API Data Integration and how to use it in the Dapresy system.

NOTE: Throughout the rest of this manual, MWM² API Data Integration will be referred to as API.

Getting Started

This API allows you to export survey data from the MWM² survey platform directly into Dapresy to be used as a data source.

Pre-Requirements

In order to use this API, you will need to have an account on MWM² platform with the API feature enabled. Account credentials are mandatory parameters for this integration into Dapresy. These credentials will be used for authentication from Dapresy.

To check if your account has API feature enabled or to enable API feature on your existing account, please contact MWM² support.

Using the System

Process Flow

The data integration process works like below:



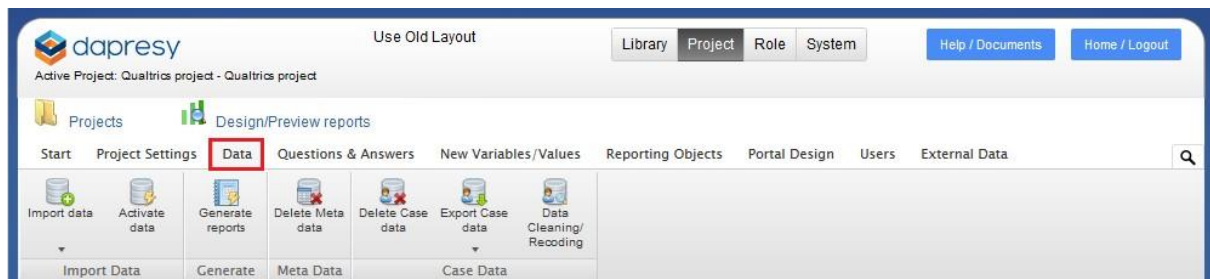
Setup Integration

To setup the MWM² API data source adapter, you must complete the following 5 tasks:

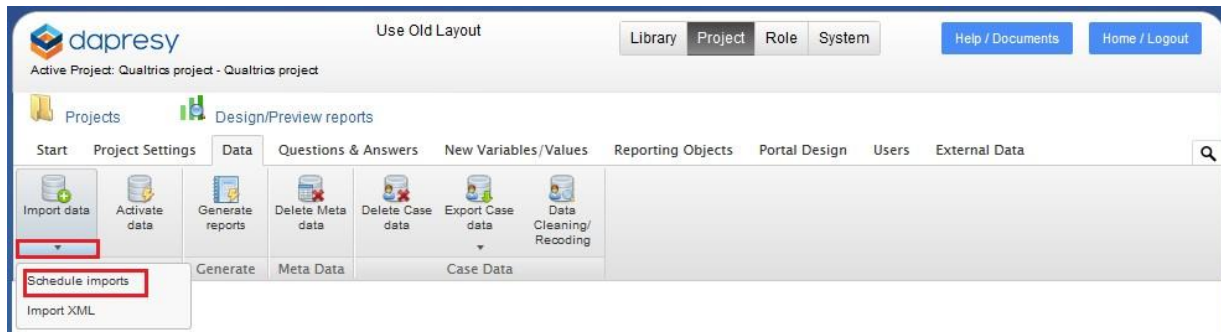
Task 1: Access Data Integration UI

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

1. Log into Dapresy
2. Select the **Data** tab from the main menu



3. Click on the arrow under **Import data**, then select **Schedule imports** from the dropdown menu



4. Then the Import Scheduler UI will be opened

Import Scheduler

Create import schedule

Schedule name:

☒ Active

Import tag:

<no tag>

▼

Edit tags...

Import type:

Single import

▼

☐ Run import on save

Date:

02/26/2018

▼

Current server time: 2018-02-26 10:23:43

Time:

11:00

▼

Update to existing dataset(s):

☐

Select mapping variable

▼

Data options:

☐ Import Metadata

☐ Delete input variable data

☐ Activate Data

Data source:

FTP Server

▼

☐ 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

Show logs

Save

Task 2: Create a Data Adapter

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:

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: Single import ☐ Run import on save

- Single import
- Weekly schedule
- Monthly schedule
- Hourly schedule

Import server time: 2018-02-26 10:48:14

NOTE: 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. This dropdown list contains all data sources that users have access to.

Data source: FTP Server

By default, the data source is set to the FTP Server, but this should be changed to **MWM²**. When MWM² is selected as the data source, then the configuration form will be loaded on UI.

Data source: MWM2 ☐ Retry import if unsuccessful

API Username:

API Password:

☐ Download completed answers only

Survey ID:

Survey List:

Time period: Total

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

Task 5: Set up Data Source

To set up the MWM² data source, you need to create an API key parameter. To learn how to do this, see Pre-Requirements on Page 5 of this manual.

To setup MWM² data source, follow these steps:

1. Enter your credentials (username/password) in proper fields on UI.
2. Click '**Load surveys list**' button.
3. The survey list will be populated with all surveys from MWM² that are linked to the provided account

Data source:

MWM2

☐ Retry import if unsuccessful

API Username:

fredrik.osterberg@dapresy.com

API Password:

••••••••

☐ Download completed answers only

Survey ID:

Survey List:

SurveyAllControls
TestSurvey
Other survey with dataenrichment
Survey with dataenrichment

Load Survey List

Time period:

Total

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

4. Select the desired survey from list, and the Survey Id field will be populated

Data source: ☐ Retry import if unsuccessful

API Username:

API Password:

☐ Download completed answers only

Survey ID:

Survey List:

SurveyAllControls

TestSurvey

Other survey with dataenrichment

Survey with dataenrichment

Time period:

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

5. 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.

Time period:

☒ Start date ☒ End date

6. 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.

There are also other options for Time period:

- Floating: This option loads respondents from last N hours or days (depends on selection)

Time period:	Floating	▼
Import responses from last:	24	▼
	Hours	▼

- Total: This option will load all respondents in survey
- Auto: When this option is selected, next import will select highest date of last imported respondent and use that as a start date for new import

Time period:	Auto	▼
Date variable:	ResponseDate	Format: yyyy-MM-dd

Response status filter

On MWM² platform you can filter respondents by completed/uncopmpleted answers. If you need to download respondents with only all completed answers, then select 'Download completed answers only' checkbox on UI

Data source: MWM2 ☐ Retry import if unsuccessful

API Username: fredrik.osterberg@dapresy.com

API Password:

☒ Download completed answers only

Survey ID: 6b9228e6-f5a9-4455-8d6e-91f2ebc670f6

Survey List: SurveyAllControls
TestSurvey
Other survey with dataenrichment
Survey with dataenrichment

Load Survey List

Time period: Auto

Date variable: ResponseDate Format: yyyy-MM-dd