

## Data Imports/Exports

SameGoal data imports/exports are used to provision API access.

- Provision API access for data import/export
- Use API access credentials

### Provision API access for data import/export


**Steps** *To provision API access for data export:*

#### 1. Create an API Account.


- Login to SameGoal as an administrator.
- Visit **Settings > Data Imports/Exports**.
- Click **+add data import/export**.
- Enter account information
  - **Import/Export Name** - Integration name (typically the name of third-party vendor).
  - **First Name** - Primary district staff member administering API access.
  - **Last Name** - Primary district staff member administering API access.
  - **Primary Email** - Primary district staff member administering API access.
  - **Additional Emails** - Additional email addresses, if any, for staff members administering API access.
  - Select **Export** or **Import**.
  - Click the **Add import/export** button.

#### 2. Approve TOS.


- The primary email address above will receive an email once the **Add import/export** button is clicked.
- Open this email.
- Accept the TOS.

- If a third-party vendor will be exporting or importing data over the REST-based API (rather than using SFTP file push), copy and paste the **clientID** and **clientSecret**. Share them both with this vendor so that they may use API access credentials.
-  **Tip** *This data import/export is not enabled until the primary email address holder has approved TOS.*
  - You can see if TOS have been approved by looking at the data imports/exports list by visiting **Settings > Data Imports/Exports** (TOS status shown inline).
  - You can resend a TOS acceptance email by clicking into the data import/export, then clicking the **Resend TOS email** button.

### 3a. Configure data export (*as applicable*).

- Configure endpoint permissions.
  - Click **+add endpoint**.
  - Select the first endpoint this export should have access to (see api.samegoal.com).
  - Update the endpoint configuration as needed for the particular integration.
  - Click the **Update** button.
  - Repeat this step as necessary for each endpoint this integration will need to access data from.
  - Click the **Update data export** button. *No endpoint configurations will be saved until this button is clicked.*
  - These endpoints will now be accessible to any third-party vendor if TOS has been approved.
- Optionally setup SFTP file push.
  - Click **Show** under **SFTP Push (optional, runs nightly)**. Enter:
    - Host
    - Username (defaults to "samegoal")
    - Password (leave empty and ask third-party to install SameGoal's public key *used by SameGoal integrations*)
    - Directory (defaults to "/")
    - File Format: JSON, XML, CSV
  -  **Tip** You will need to ask your third-party vendor for SFTP information above (host, username, etc).
  - Click **Update data export**.
  - Optionally click **Run data export** if you wish to run a manual test.
  - The first automated file export will occur after midnight UTC.


### 3b. Configure data import (*as applicable*).

- Configure pull locations.
  - Click **+add pull location**.
  - In the **Update Pull Location** dialog, enter:
    - **Endpoint:** Select
    - **File path:** File path on SFTP
    - **File type:** Choose CSV, JSON or XML
    - **Folder:** Check only when file path specified above is a folder (only relevant when endpoint uses more than one file)
  - Click the **Update** button.
  - Click **Show** under **SFTP Pull (optional, runs nightly)**. Enter:
    - Host
    - Username (defaults to "samegoal")
    - Password (leave empty and ask third-party to install SameGoal's public key *used by SameGoal integrations*)
  - Click the **Update data import** button. *No pull locations will be saved until this button is clicked.*
  - These endpoints will now be accessible to any third-party vendor if TOS has been approved.
  - Optionally click **Run data import** if you wish to run a manual test.
  - The first automated file import will occur after midnight UTC.
-  **Tip** If vendor will make API calls, configuring an SFTP pull location is not required.

## Use API access credentials

**Steps** *To use API access credentials (eg instructions for third-party vendors):*

- Visit [api.samegoal.com](https://api.samegoal.com).
- Click the green **Authorize** button.
- Enter **client\_id** and **client\_secret**.
- Click the **Authorize** button.
- API access should now be authorized. This page can also be used to execute example API calls.

 **Tip** If TOS has not yet been approved for this API access, API access will be unsuccessful.