

## Data Imports/Exports

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


- Create an API Account
- Approve TOS
- Configure Data Export
- Configure Data Import
- Use API Access Credentials

### 1. Create an API Account

1. Log in to SameGoal as an administrator.
2. Visit **Settings > Data Imports/Exports**.
3. Click **+add data import/export**.
4. 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

1. The primary email address above will receive an email once the **Add import/export** button is clicked.
2. Open this email.
3. Accept the TOS.
4. 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.

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\* A **Client Secret** is a secret value (similar to a password) that grants a client application access to an authorization server.


### 3a. Configure data export - as applicable

Configure endpoint permissions.

1. Click **+add endpoint**.
2. Select the first endpoint this export should have access to (see [api.samegoal.com](https://api.samegoal.com)).
3. Update the endpoint configuration as needed for the particular integration.
4. Click the **Update** button.
5. Repeat this step as necessary for each endpoint this integration will need to access data from.
6. Click the **Update data export** button. *No endpoint configurations will be saved until this button is clicked.*
7. These endpoints will now be accessible to any third-party vendor if TOS has been approved.

Optionally setup SFTP file push.

1. 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
2. Click **Update data export**.
3. Optionally click **Run data export** if you wish to run a manual test.
4. The first automated file export will occur after midnight UTC.

 **Tip** You will need to ask your third-party vendor for SFTP information above (host, username, etc).

### 3b. Configure data import - as applicable

Configure pull locations.


1. Click **+add pull location**.
2. 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)
3. Click the **Update** button.
4. 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*)
5. Click the **Update data import** button. *No pull locations will be saved until this button is clicked.*
6. These endpoints will now be accessible to any third-party vendor if TOS has been approved.
7. Optionally click **Run data import** if you wish to run a manual test.
8. 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):*

1. Visit [api.samegoal.com](https://api.samegoal.com).
2. Click the green **Authorize** button.
3. Enter **client\_id** and **client\_secret**.
4. Click the **Authorize** button.
5. 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.