samegoal

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.

** 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).
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 (e.g. instructions for third-party vendors):*

1. Visit 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.