

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.
- 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.