

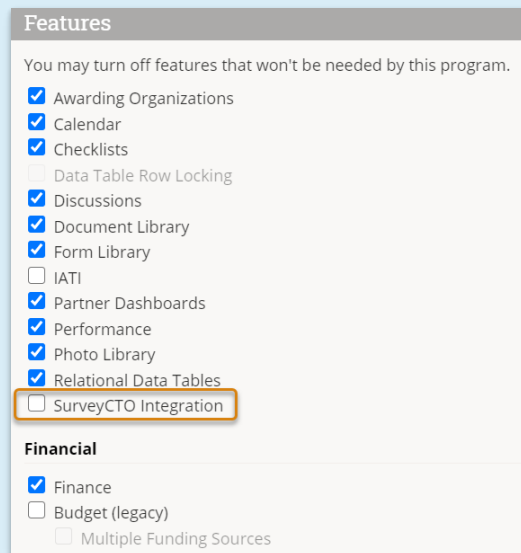
Import Data From SurveyCTO

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DevResults integrates fully with **SurveyCTO**, a mobile data collection tool. Surveys in SurveyCTO can be imported to DevResults as a data table. In this article:

- **Tips for designing your SurveyCTO survey**
- **Create a DevResults data table and import SurveyCTO data**
- **Refresh an existing DevResults data table with SurveyCTO data**
- **Set up automatic import of data from SurveyCTO to DevResults**
- **Edit information in a SurveyCTO-linked DevResults data table**

Note: To enable the SurveyCTO integration, a site owner must go to **Administration > Settings** and enable **SurveyCTO integration** from the list of available features.



Features

You may turn off features that won't be needed by this program.

- Awarding Organizations
- Calendar
- Checklists
- Data Table Row Locking
- Discussions
- Document Library
- Form Library
- IATI
- Partner Dashboards
- Performance
- Photo Library
- Relational Data Tables
- SurveyCTO Integration

Financial

- Finance
- Budget (legacy)
- Multiple Funding Sources

Tips for designing your SurveyCTO survey

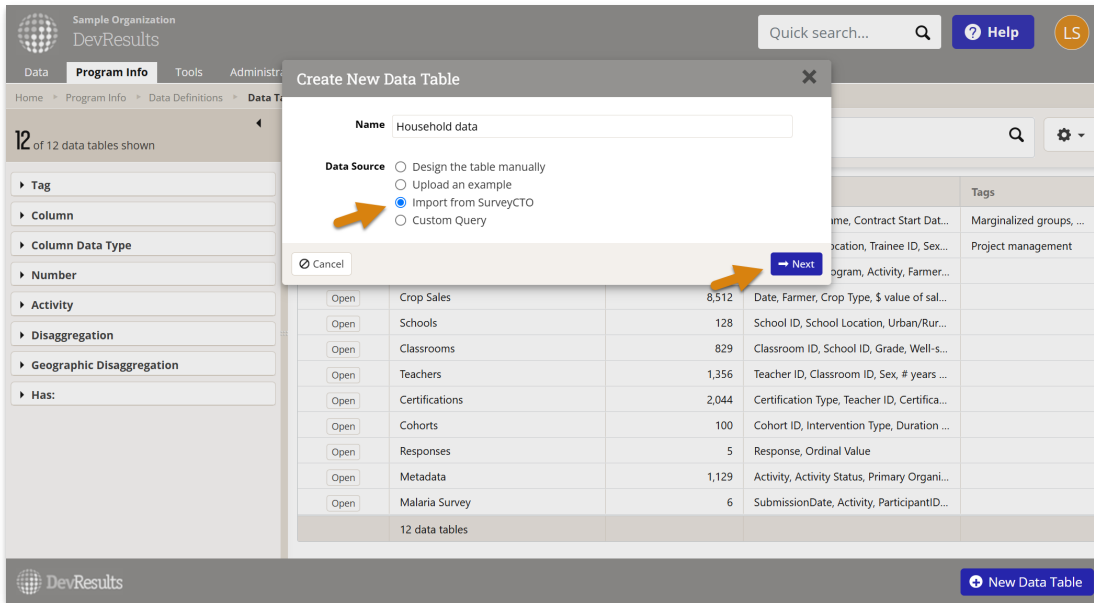
Whether or not you've already created your SurveyCTO surveys, please reach out to us at help@devresults.com to chat about the design. We can provide you with an automatically-generated file that contains the multiple choice answers to your survey questions so that all you need to do is upload it to SurveyCTO and link it to your questions. This means that:

1. It **saves you time** creating the survey.
2. Most importantly, this is the best way to make sure that **what you import from SurveyCTO will match your indicator's geographic and demographic disaggregations in DevResults**. Multiple choice answers in SurveyCTO must match your disaggregation categories in DevResults in order to be imported, and we have a simple way to ensure that they match, and to keep things synced as you change or expand your program information.
3. If you're **collecting new location information via SurveyCTO**, we can help with a shortcut to add those new places to DevResults, which is also key to keeping things synced between the systems.

Create a DevResults data table and import SurveyCTO data

From any page on DevResults, go to **Program Info > Data Tables**

Click **(+) New Data Table**, name the table, and select **Import from SurveyCTO**. Then click **Next**.



You will now be prompted to enter information on the SurveyCTO form you would like to connect to.

You will need to enter the **Server** name (this is the prefix to your SurveyCTO URL), the **Form ID** (the name of the SurveyCTO form you want to link to), as well as your **SurveyCTO email and password**. If you're unsure about any of these fields, please refer to [SurveyCTO's documentation](#) and then reach out to us at help@devresults.com.

The screenshot shows the 'Create New Data Table' dialog box with the following fields and text:

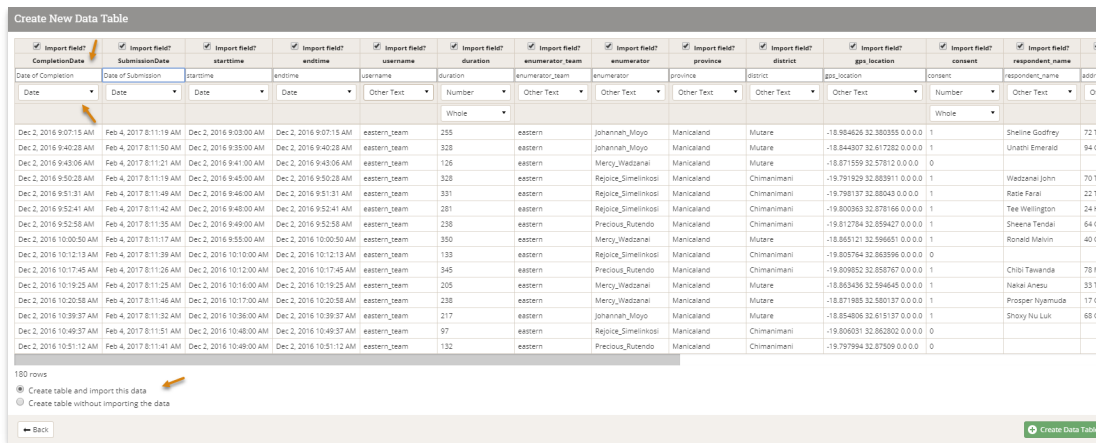
- Server:** Your SurveyCTO server name .surveycto.com
- Form ID:** The unique ID of your SurveyCTO form
- Email:** The email address that you use to log in to SurveyCTO
- Password:** Your SurveyCTO password

* DevResults will not store your password
[Need help connecting to SurveyCTO?](#)

Buttons: Back, Next

Once you've entered this information, click **Next**.

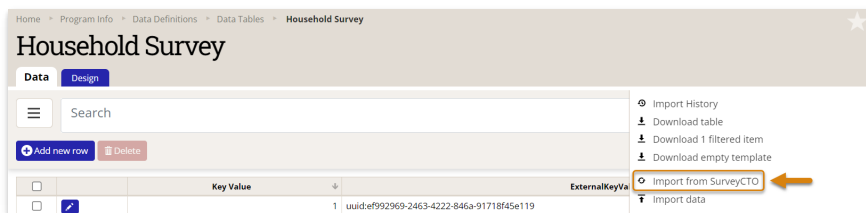
You can now configure the titles and types of columns you want to import, de-select fields you don't want to import, and choose to either create the table and import data or create the table without importing data.



Click **(+) Create Data Table** to complete the import process.

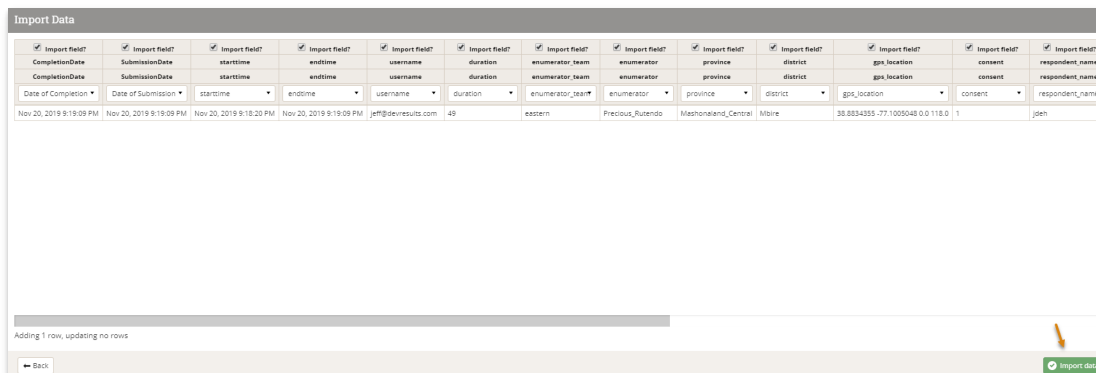
Refresh an existing DevResults data table with SurveyCTO data

When new information has been collected on SurveyCTO, you can refresh the data table by clicking on the right-hand gear icon and clicking "Import from SurveyCTO."



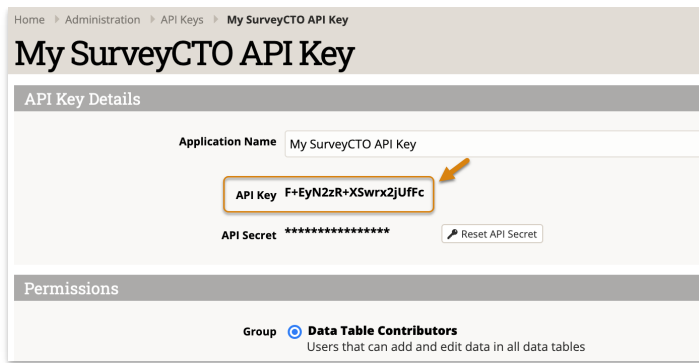
DevResults does not store external passwords, so you will be prompted to enter your SurveyCTO password once again.

You will then be asked to review the new and updated rows of information before you can complete the import. Click **Import data** once you've reviewed the new information.



Set up automatic import of data from SurveyCTO to DevResults

1. In DevResults, **create an API key** that will be used by SurveyCTO to log into DevResults. The key should belong to a permission group that has **View & Edit** permissions for the **Data Table Manager** role; sometimes it makes sense to create a group just for the new API Key. Take note of the "API Key" field (you do not need the "API Secret" field).



2. In SurveyCTO, **create webhooks** for each table that you'd like to automatically update.

- Point the webhook at the relevant API endpoint for each table. You can find the API endpoint at the bottom of the **Design** tab for each SurveyCTO-linked data table. The format for the API endpoint is:

```
https://{site}.devresults.com/api/dynamictables/{dynamicTableID}/webhook
```

- For each table, select the fields/columns that should be published to DevResults (some or all of the table).
- For each webhook, add authorization. Use a JSON text summary and call it **DevResultsApiToken**. The value that you send is the API Key value from the first step.

Include hyperlink to submission details?

Include text summary?

JSON element name for text summary:

DevResultsApiToken ←

JSON text:

F+EyN2zR+XSwrX2jUfFc ←

Include \${fieldname} references to dynamically include field data in the text summary.

Embed binary fields?
If not embedded, binary fields will be published as hyperlinks.

Cancel
Save

Currently, SurveyCTO is not able to send any error messages if something is incorrect, so if the data does not import as expected, please reach out to us at help@devresults.com and we will investigate.

Edit information in a SurveyCTO-linked DevResults data table

You may add/import, edit, or delete data in a SurveyCTO-linked data table just as you would any other data table. You may also add, edit, delete, or reorder columns, though any changes you make will not automatically synchronize with SurveyCTO.

Note: Changes made to the data as well as the structure of a SurveyCTO-linked data table will not be replicated or automatically synchronized with the survey or data in SurveyCTO. Instead, you should only make changes in DevResults to reflect changes that you have already enacted in your SurveyCTO server. When adding a new column to a SurveyCTO-linked data table, be sure to list the name of the SurveyCTO field in the **External Field** column on the DevResults data table design tab.

Each row of SurveyCTO data in DevResults is associated with both a DevResults Key/Value and a SurveyCTO **ExternalKey/Value**. This ExternalKey/Value will let you identify the same row of data in DevResults and SurveyCTO.

ExternalKey/Value

You can look up specific rows in SurveyCTO by clicking on the **Monitor** tab, and selecting "**Look up by key**" for your form.

The screenshot shows the SurveyCTO web interface. At the top, there are navigation tabs: 1. Design, 2. Collect, 3. Monitor (selected), 4. Export, and a Configure gear icon. Below the tabs, the page title is "Sample household listing form with sample data". On the right side, there are several action icons: Monitor form data, Review workflow, Purge form data, Look up by key (highlighted), and Advanced mode. The main content area displays "Form ID: hh_listing_2, Complete submissions: 180 (latest Nov. 18, 2019 at 11:56:18AM)". A dialog box titled "Look up by key" is open, containing the following text: "If you have the unique key for one or more submissions (also called a 'unique ID', 'UUID', or 'instance ID'), you can enter them here in order to view those submissions in full. Use the *Monitor form data* action instead to view all submissions, or if you don't know the unique key for the submissions you want to view." Below this text is a section labeled "Submissions to look up:" with a text input field containing the placeholder "Enter the unique key(s)". A note below the input field states: "You can include multiple keys separated by commas, spaces, and/or line-breaks." At the bottom of the dialog box are two buttons: "View submissions" and "Close".

Didn't answer your question? Please email us at ahelp@devresults.com.

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