

SurveyMonkey Connector

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You can download the SurveyMonkey connector from Yellowfin's Marketplace to connect to your SurveyMonkey account. This section shows you how to download this connector and install it to your instance of Yellowfin.



The user performing these steps must possess administrative rights that allow them to create a new data source connection.

Register Your App

You will need to register your app on SurveyMonkey before you can use this connection. It is also mandatory that you make this app a **public** one and include the following scopes:

- View Surveys
- View Users
- View Collectors
- View Contacts
- View Responses
- View Response Details

This is the data that will be extracted from SurveyMonkey and streamed into Yellowfin. You can see the list of all the required scopes by navigating to the settings page on SurveyMonkey:

Home > My Apps > Settings button (of your public app) > scroll down to the Scopes panel

SCOPES

Set the [scope](#) requirements for your application. Scopes allow your application to access resources on behalf of users. If a scope is required, users must approve it for OAuth to succeed. If a scope is optional, users do not need to approve it for OAuth to succeed, but your application will not be able to access resources controlled by scopes that aren't approved. If your application uses scopes that require a [paid SurveyMonkey plan](#), users will need a paid plan to use your application. Read more about [scopes](#).

NOTE: If you change scopes for your application you will need to re-authenticate all users to access new scopes.

	View Surveys	Required
	View Users	Required
	View Collectors	Required
	View Contacts	Required
	View Responses	Required
	View Response Details	Required
	Create/Modify Surveys	Not Requested
	View Groups	Not Requested
	Create/Modify Collectors	Not Requested
	Create/Modify Contacts	Not Requested
	View Library Assets	Not Requested
	Create/Modify Webhooks	Not Requested
	View Webhooks	Not Requested
	Create/Modify Responses	Not Requested

Update Scopes

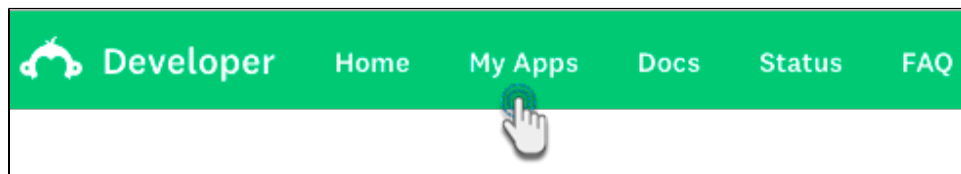
The Registration Process

Click below to see how to register your app on SurveyMonkey.



Please note that this process is dependant on SurveyMonkey, and may be changed by them without notice.

1. Log in to <https://developer.surveymonkey.net/> using your SurveyMonkey account.
2. Click on My Apps in the header.

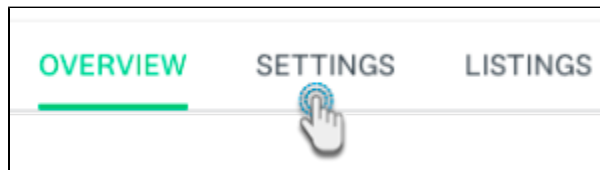


3. Then click on the Add a New App button.



4. Enter a name for your app in the popup, and choose the option to make the app a public one.
5. Then click on the Create App button.

6. Once the app is registered, you will be taken to its overview page.
7. Click on the Settings tab.



8. Scroll down to the scopes section and click on the following scopes:
 - View Surveys
 - View Users
 - View Collectors
 - View Contacts
 - View Responses
 - View Response Details
9. Then click on the Update Scopes button.

Scopes

Set the [scope](#) requirements for your application. Scopes allow your application to access resources on behalf of users. If a scope is required, users must approve it for OAuth to succeed. If a scope is optional, users do not need to approve it for OAuth to succeed, but your application will not be able to access resources controlled by scopes that aren't approved. If your application uses scopes that require a [paid SurveyMonkey plan](#), users will need a paid plan to use your application. Read more about [scopes](#).

NOTE: If you change scopes for your application you will need to re-authenticate all users to access new scopes.

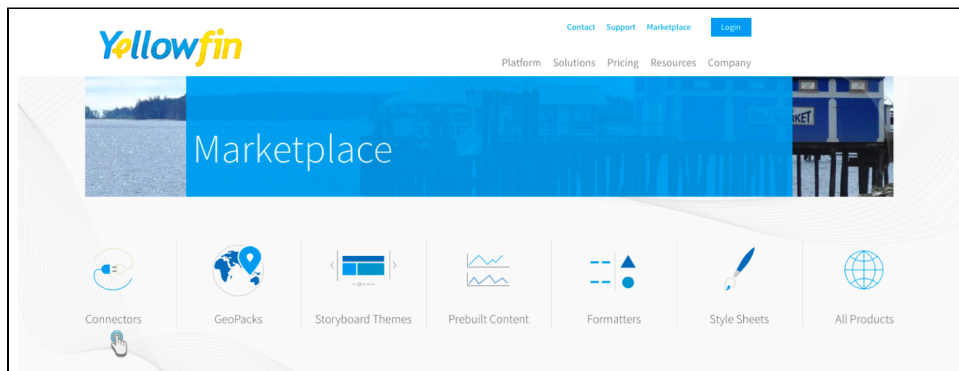
⊘ Create/Modify Surveys	Not Requested	🔒 View Surveys	Required
🔒 View Users	Required	⊘ View Groups	Not Requested
⊘ Create/Modify Collectors	Not Requested	🔒 View Collectors	Required
⊘ Create/Modify Contacts	Not Requested	🔒 View Contacts	Required
⊘ View Library Assets	Not Requested	⊘ Create/Modify Webhooks	Not Requested
⊘ View Webhooks	Not Requested	⊘ Create/Modify Responses	Not Requested
🔒 View Responses	Required	🔒 View Response Details	Required

Update Scopes

Download the SurveyMonkey Connector

You can download the SurveyMonkey connector from Yellowfin's marketplace:

1. Log in to Yellowfin's [Marketplace](#)
2. Click on the option for Connectors



3. Choose SurveyMonkey from the selection of connectors available on Yellowfin
4. When this connector option expands, click on the Download button. (If you see the *Login to Download* button instead, you will first need to log in to the Marketplace to continue)



SugarCRM

Connect to SugarCRM and instantly analyze your sales processes.



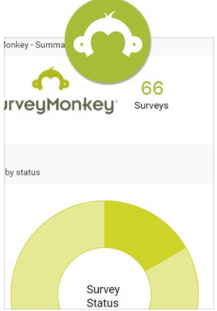
SurveyGizmo

Get connected to your SurveyGizmo account to visualize your surveys and their responses.



SurveyMonkey

Get connected to your SurveyMonkey account and analyze your surveys and responses.



SurveyMonkey
Price : Free
Author : Yellowfin

Yellowfin's SurveyMonkey connector allows you to connect to your SurveyMonkey data, retrieve your surveys and responses to them. Use Yellowfin to visualize the responses to get better insights from your surveys. The connector is shipped with prebuilt content to help you instantly get visualizations of your surveys and responses.

[Click here for instructions.](#)

Content provider's API connectors can be subject to change. If you do notice any changes in your Yellowfin content, please contact us on support@yellowfin.bi

Supported : Minimum YF 7.2
Support Contact : [Click here](#)

[Download](#)

5. The SurveyMonkey connector file should now be downloaded

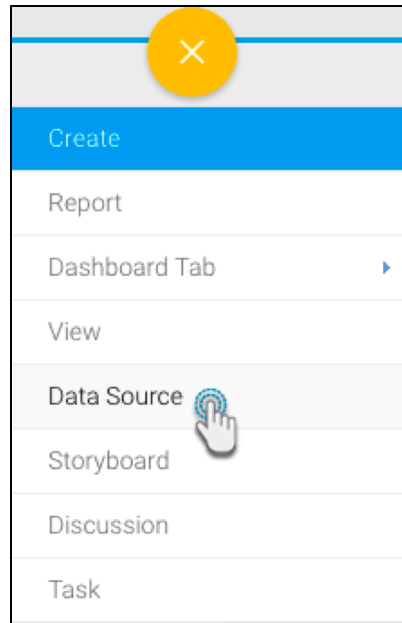
Import the SurveyMonkey Connector

Here's how to upload the SurveyMonkey connector to Yellowfin:

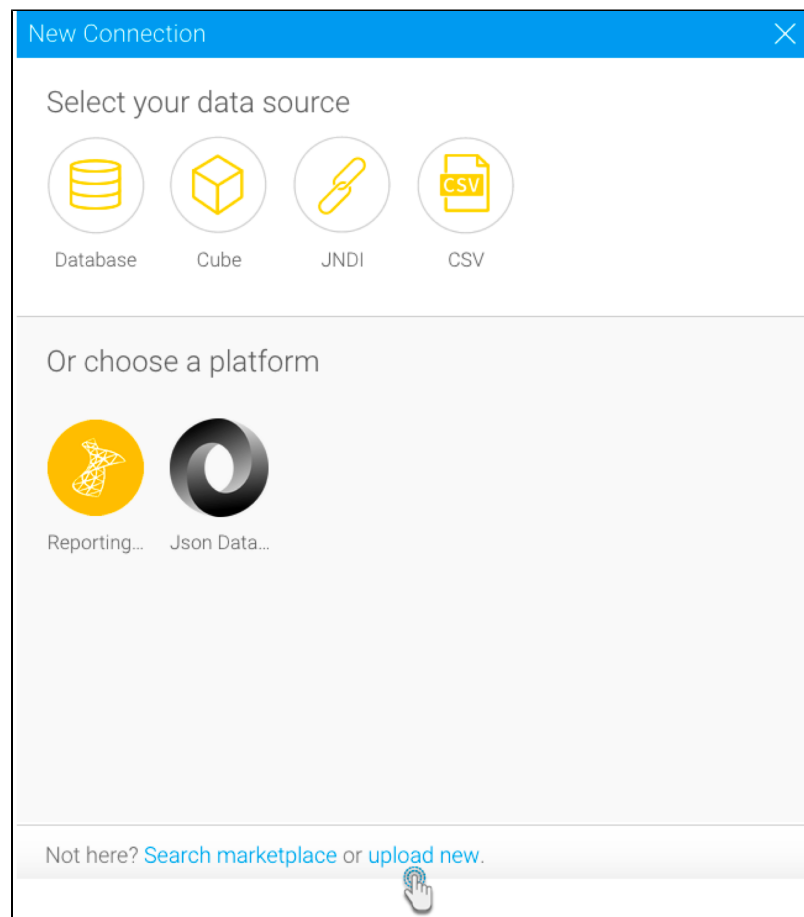


Ensure that you have an active SurveyMonkey account. You will need to obtain a few configuration details from this account.

1. Click on the Create icon after logging in to Yellowfin
2. Select the Data Source option



3. At the bottom of the new connection screen, click on the upload new link



Note: You can also upload a new connector by following this Yellowfin path: Administration > Admin Console > Data Sources > Add

4. In the new connection popup, either drag and drop the SurveyMonkey connector file you downloaded from the marketplace, or click on the Browse Files link to browse and select the file
5. Once the file has been successfully uploaded, click on the Connect Platform button

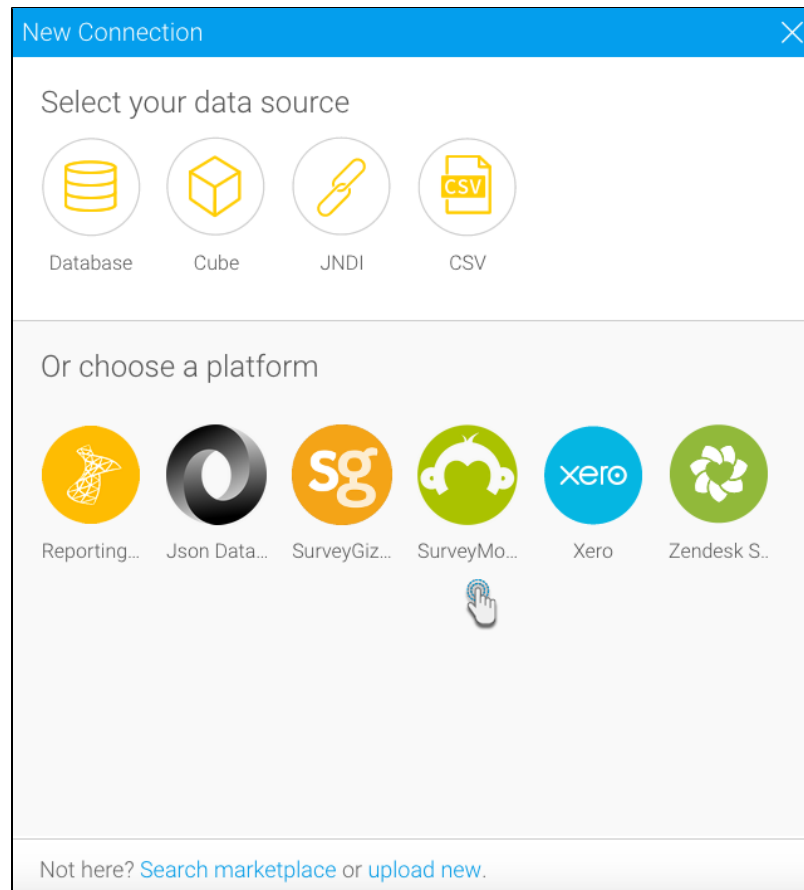
The screenshot shows a 'New Connection' dialog box with a blue header and a close button. A progress bar at the top has four steps: 'Marketplace' (active), 'Connect Platform', 'Create View', and 'Analyze'. Below the progress bar, a message states 'File Uploaded Successfully' for 'connector-SurveyMonkey.yfp' with a '+ Add more' link. There are input fields for 'Name' (containing 'connector-SurveyMonkey.yfp') and 'Description' (with a placeholder text). A list of uploaded files is shown below, including 'surveymonkey.jar', 'content.xml', and three JAR files. At the bottom, a blue 'Connect Platform' button is highlighted with a hand cursor, next to a dropdown arrow.

6. Now you can create a SurveyMonkey connection, as explained in the following section.

Create a SurveyMonkey Connection

Next, you can continue by providing details of your SurveyMonkey account.

1. Either continue on from the previous step, or navigate through to Create New menu > Data Source to use the SurveyMonkey connector
2. Then click on the new SurveyMonkey connector



3. The following connection setting screen will appear

New Connection





Connection Setti...
Create View
Analyze

Name:

Description:

Connection Instructions:

1. Provide access token obtained from SurveyMonkey.
2. Provide api key obtained from SurveyMonkey
3. Click on Validate Token, If API KEY and Access Token are valid then user name will be populated
4. Select time interval for historical data retrieval

Authentication:

☒ New Authentication
☐ Old Authentication

1. Provide Access Token:

3. Validate Access Token:

4. User Name:

5. Select Time Interval:

User Timezone:

Validate Token

90 Days

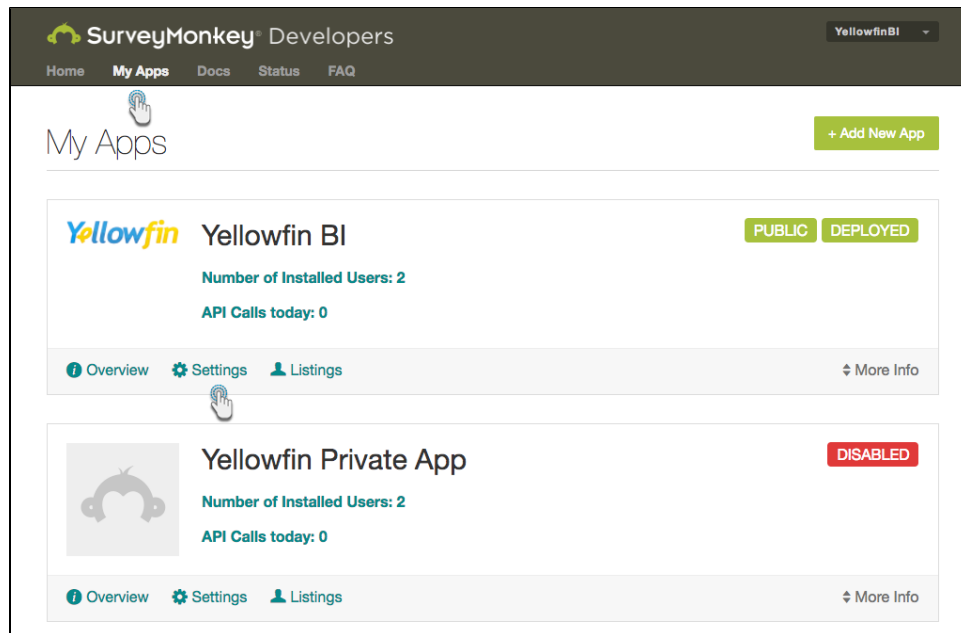
GMT (GMT 0.0)

Launch Pre-Built Content

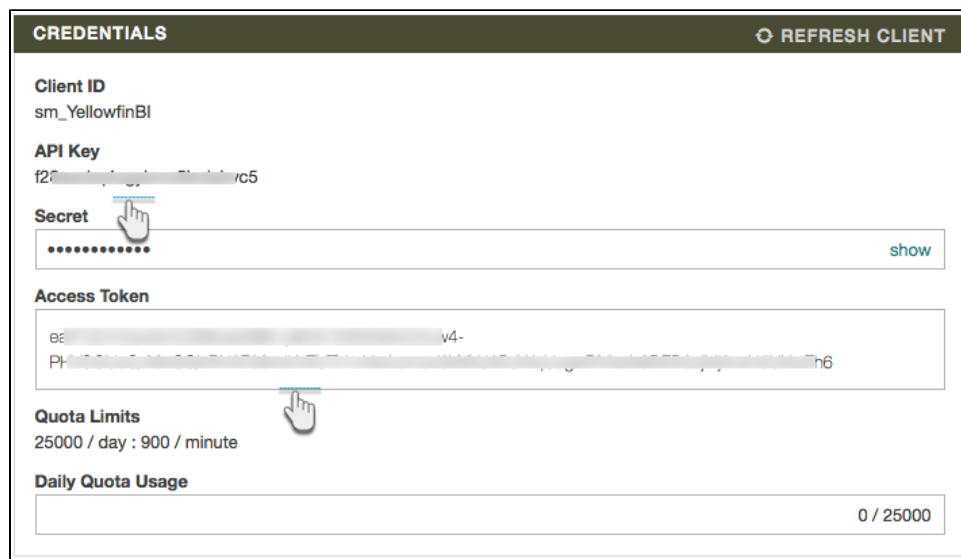
4. Provide a suitable name for your connection
5. You can also write a brief description, if required
6. Choose whether your SurveyMonkey connection is a new or an old one

i For apps registered before 1st November 2016, use the old authentication option; and for those registered on or after 1st November 2016, apply the new authentication feature. Apps with the old authentication registration will require an additional value of API keys to be provided.

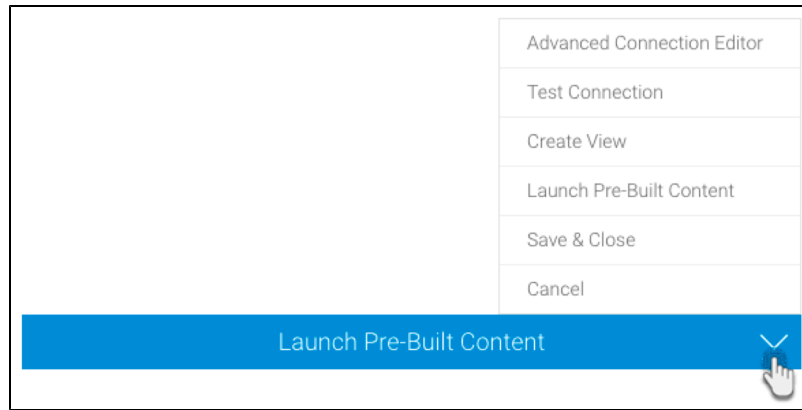
7. Next, access developer.surveymonkey.net and log into your account
8. Click on My Apps in the header menu
9. Now click on the Settings option of the public app you want connected to Yellowfin and obtain the required key(s) from the credentials panel. (See the [Register Your App](#) section above, to make sure all the requirements are met.)



10. If your app has a new authentication, you will need to copy just the access token; however for apps with old authentication, you will need the API key along with the access token



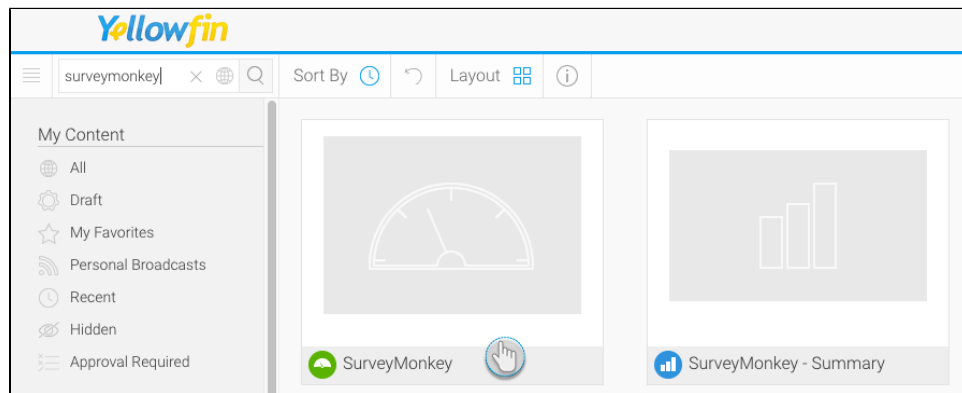
11. Return to your Yellowfin instance and paste the key(s) into the required field(s)
12. Click Validate Token
13. Once successfully validated, your account name should appear in the form
14. Select time interval to establish a limit for streaming previous data into Yellowfin
15. Choose your preferred time zone to set the responses and comments received on your account to that time
16. Now you may perform the following additional tasks on this connection, although you are not required to: (Click on the menu button besides the Launch Pre-Built Content button to make a list of actions appear)



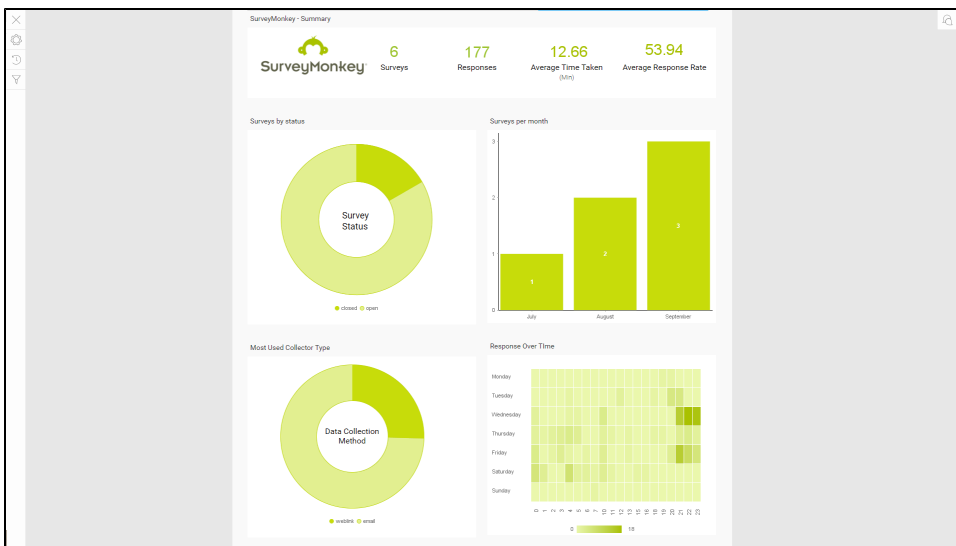
- **Advanced Connection Editor:** This will take you to the Data Source page in the Admin Console and allow you to edit all the advanced options available for your data source.
- **Test Connection:** This option lets you test out your SurveyMonkey connection settings to ensure that you can connect to your data source
- **Create View:** This re-directs you to the view creation screen.
- **Launch Pre-Built Content:** This allows you to install any pre-built content that may come with the connector.
- **Save & Close:** Use this action to save your connection details and return to the previous screen, closing the connection popup.
- **Cancel:** This closes the connection window without saving any details.

17. We will proceed by clicking on the Launch Pre-Built Content button

18. You will get redirected to Yellowfin's browse screen with the new SurveyMonkey dashboard present there. (Note: You might need to search for this dashboard, if its thumbnail cannot be seen right away)



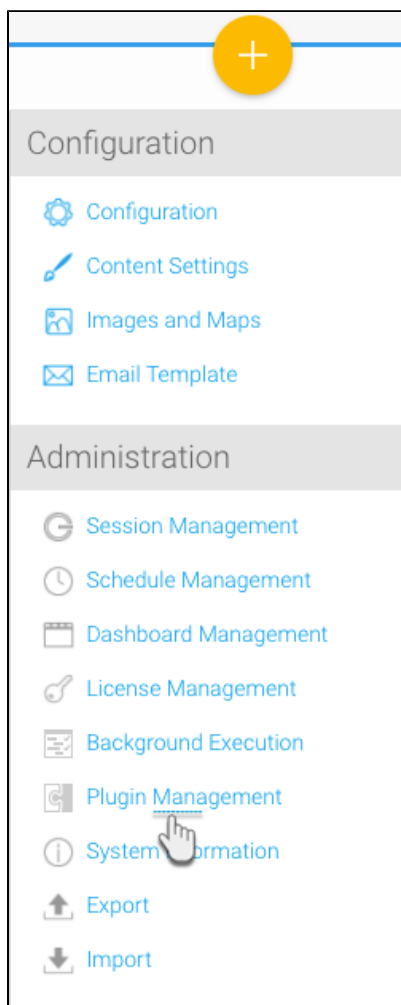
19. If you access this dashboard, you will be able to view your SurveyMonkey app data through Yellowfin (as shown in the example below)



Delete the SurveyMonkey Connector

You can delete the SurveyMonkey connector from your Yellowfin instance by following these simple steps below.

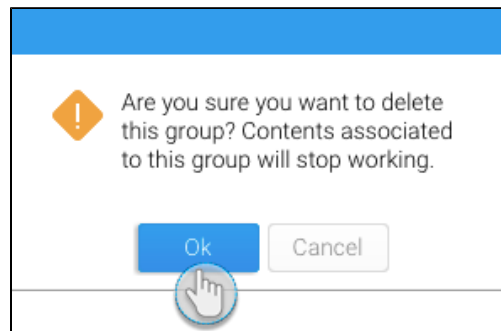
1. Navigate to left side menu > Administration > Admin Console
2. From the options listed on the right side, click on Plugin Management under Administration



3. At the Plugin Management page, select the checkbox for the SurveyMonkey connector
4. Then click on the delete button on the bottom right

	Name	Description	Type
☐	 connector-surveygizmo.yfp		PLUGIN
☐	 connector-xero.yfp		PLUGIN
☐	 connector-zendesk.yfp		PLUGIN
☒	 connector-SurveyMonkey (2).yfp		PLUGIN
	 commons-httpclient-3.1.jar  surveymonkey.jar com.hof.surveyMonkey.SurveyMonkeyDataSource (Third Party)  content.xml  commons-codec-1.10.jar  json-20160212.jar  commons-logging-1.1.1.jar		
			Edit Delete
☐	 connector-json.yfp		PLUGIN 
Select All / Deselect All			Add Delete

5. Choose OK when the confirmation dialogue box appears



6. Your SurveyMonkey connector would be removed from the system