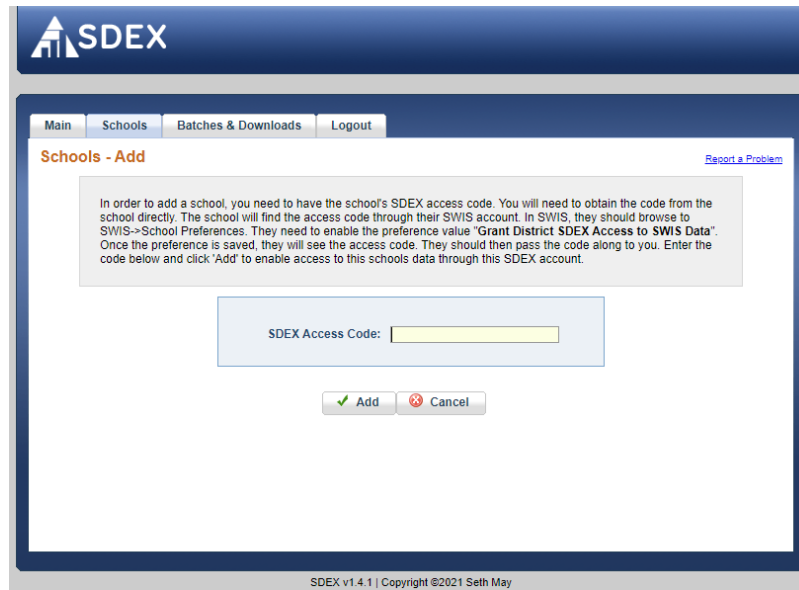This configuration guide will walk MiDataHub users through the process of creating an inbound integration for importing SWIS referral data.

Start out by creating an account at the following website:

https://sdex.swis.org/

Complete these steps:

1. Create an Account from the SDEX homepage:
   a. Click the Create Account button.
   b. Type the email associated with the SDEX account in the Email field.
   c. Type the password for the account in the Password field and retype it in the Verify Password field.
   d. Fill out the account profile by typing in the First Name, Last Name, Organization Name, Phone Number, and School/District information system name (if appropriate) in the affiliated fields.
   e. Click Create Account.
   f. The application sends a verification email to the email address listed during account setup.
   g. Follow the steps outlined in the email to verify the account.
   h. Log in at the SDEX homepage to access the newly created account!
2. To log in, from the SDEX homepage:
   a. Enter the email address and password associated with the SDEX account.
   b. Click Login.
   c. Click Continue
3. To add new schools to an SDEX account:
   a. Click the Schools tab at the top of the application.
   b. Click Add.

c. Enter the School Access Code provided by the school. Note: dashes and spaces in the code can be omitted.
d. Click Add to add the school or cancel to return to the school's menu.
e. A green notification appears when the school is added successfully.

4. Add a Batch. From the Batches & Downloads tab:
   a. Click Add.

b. Give the batch a name by typing the name in the Batch Name field.
c. Select the CSV v2 (SWIS 5) file type from the Download Type drop-down menu. (See note about file types.)
d. Security Code: Leave this field blank.
e. Select the earliest date from which data will be included in the file.
   i. The date entered in this field represents the starting date data will be exported from.
f. Select yes for each of the three items below to include in the file:
   i. Student/Staff Names
   ii. School NCES ID
   iii. Other, Extra Info, and Custom Fields
g. Leave the Use Old CSV Column Ordering option set to No.

h. Check the box next to the name of authorized schools to add them to the batch. Note: Select as many schools as needed. At least one school must be included for data to download.

i. Click Add to add the batch or cancel to return to the batch list.

5. Download a Batch file:

   a. SDEX accommodates both manual, ad hoc downloads as well as automated, recurring downloads. To download a file manually refer to page 3 in the SDEX User's Manual:

      i. Click Batches & Downloads.

      ii. Click to select the batch to download.

         1. **Note:** Downloading batches with 0 records results in an error.

      iii. Click Download.

      iv. A ZIP file downloads with the following files:

         1. CSV data

         2. SWIS lookup values – all referral categories and label IDs.

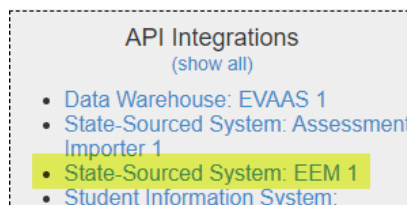   3. Layout Reference – description of each referral field

At this point, the files downloaded from SDEX can be uploaded into the MiDataHub.

NOTE: Please follow this link if you are interested in learning how to automate the exporting of referral data from SDEX. This documentation assumes you have already downloaded Powershell and have experience using this technology.

Please follow the steps below to configure the SWIS Referral data import to MiDataHub:

Step 1: Ensure the EEM API integration is configured in MiDataHub. (To complete this step, you will need to have authorization in MiDataHub as a technical contact. Individuals with this authorization are typically individuals within technology or data teams.) If you need assistance with determining who in your district has this level of permission, please contact support@midatahub.org.

Login to the MiDataHub Cockpit and navigate to the API Integration section, located in the bottom right corner of the screen, and confirm the EEM integration is configured. If the EEM integration is configured, you will see a listing titled State-Sourced System: EEM 1 as below. If this is configured, please proceed to step **1B**. If you do not see the EEM integration proceed to step **1A**.

Step 1A: Configure the EEM Integration.
Click Add integration under the API Integrations and configure the EEM integration by selecting the following options:

System Type: State Sourced Systems
Vendor: State of Michigan
System: EEM – V1
Profile: EEM

After selecting only those options, click the submit button and wait 24 hours before proceeding to step **1B**.

Step 1B: Confirm the EEM integration has completed the required mappings required by the SWIS Referral Data Import

Login to the MiDataHub Cockpit and navigate to Reports> View District Reports > Data Quality Reports > and select the EEM Entity Mapping Report. After the report has loaded, ensure the mappings for each category are populated. The example below shows a fully populated report. If you login and do not see this completed, please email support@midatahub.org before proceeding to the next step.

After the EEM Mapping has been completed per the above steps please proceed to the steps below:

Login to the MiDataHub Cockpit for your district and locate the Inbound Integration section (bottom left corner). Once there, click "(show all)" and review the list of integrations to ensure the SWIS Integration is not currently configured or disabled.

If integration is available, please proceed to step 3

If the integration is not available proceed forward (Step 2) by selecting the Add Integration link.
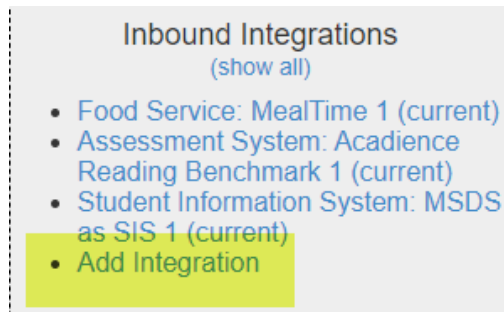
Step 2: Configure the integration using the settings below:

> **System Type:** Behavior Tracking System
> **Vendor:** University of Oregon
> **System:** SWIS – v1
> **Profile:** Type – None
> **Year:** Current Year

Source:

> **Location Type:** Local
> **User ID:** This will be a default user id, no need to edit
> **User Password:** This can be any password you would like to use. For my example I used DataHub01!

Schedule:

> **Schedule Type: One-Time**
> > ***NOTE:** You have multiple options under this pull-down menu. As a user you can select the file to import on a one-time basis, daily, weekly, or monthly basis. For my example we are going to select the One-Time option as we will only be importing the data one time for this example.
>
> **Start Date:** This is the date when the scheduled imports will begin. For this example, I will set the date for one day prior to the day I will be importing the data for the first time. This is done so that the import will not execute on a scheduled basis.
>
> **Start time:** This is the time the import will start. For this example, I am using 2:00 PM
>
> Upon completing the integration your screen should look similar to below. Click Submit and proceed to next step.

Step 3: After clicking the Submit button in the previous step, you should return to the MiDataHub Cockpit. From here, navigate back to the Inbound Integrations, and select the newly created Behavior Tracking System: SWIS 1 (current) integration by clicking it.

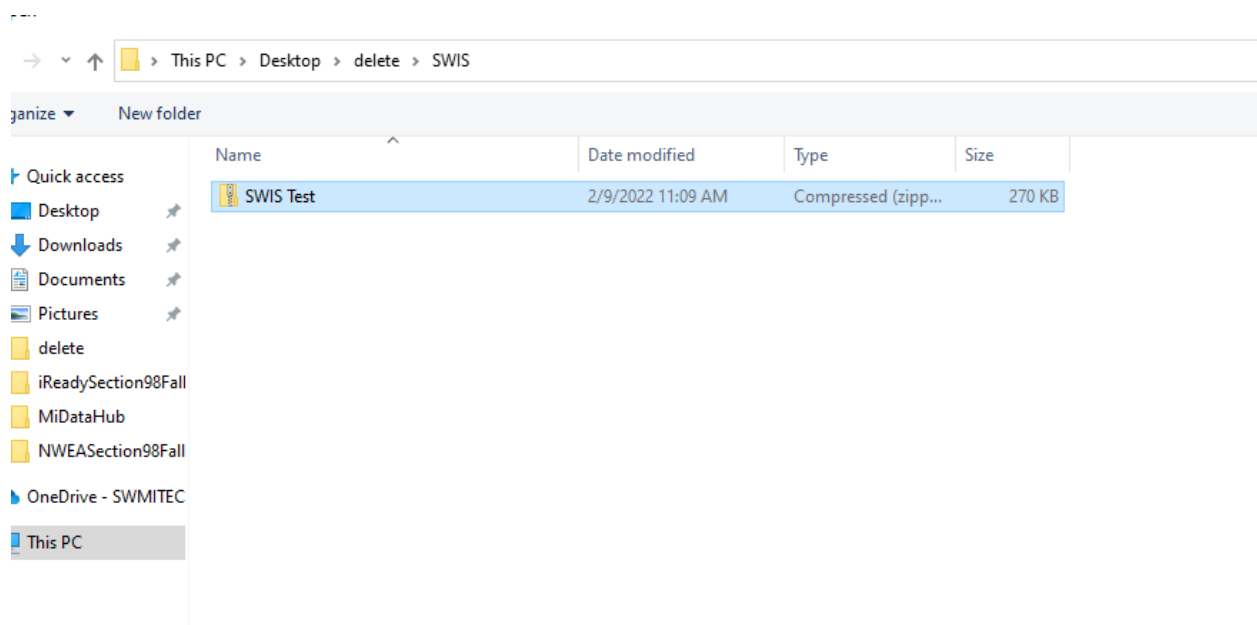***NOTE: This step needs to be completed every time a user would like to import an updated file to MiDataHub.**
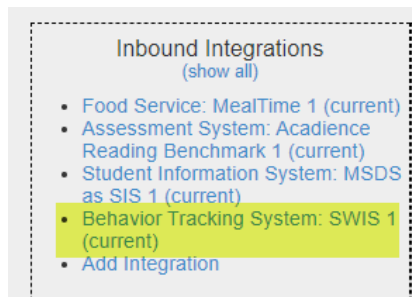
Step 4: Select the upload button
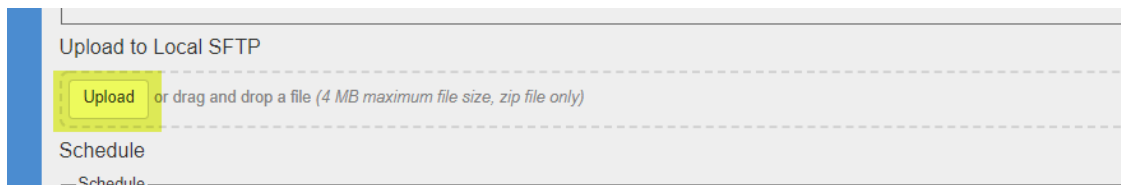
Step 5: Locate and select the previously downloaded SWIS file. **This file needs to be in a ZIP format.**

Step 6: After selecting the file you should be redirected back to the screen below. Upon a successful import of the SWIS data file you will notice a complete indication along with a 100% green bar.

Since we are importing this data manually (and not setting a schedule), you will need to select the Run at the next available cycle checkbox. Click the submit button after selecting the Run at the next available cycle checkbox. Your file will begin processing within the next few minutes. The amount of time required for the import is dependent upon the size of the file. Larger files will take longer to load.

Step 7: To verify the status of the integration you can select it from the Inbound Integration section. After clicking the integration, and at the bottom of this screen, under the Runbook Activities section you will be able to verify the import. There is a brief period (up to 5 minutes) after clicking the Submit button that this import process will begin. We recommend refreshing/reloading the browser to ensure the browser window is up to date.

The three statuses are listed below:

> **Blank:** indicates the import is still running
> **Green Checkmark**: successful import
> **Red X:** unsuccessful import, suggest reaching out to support@midatahub.org for assistance

Verifying the referral data:

Under the Manage Custom Exports functionality in the MiDataHub Cockpit a user can verify the imported SWIS Referral Data by running the SWIS Referral Data QA School Year Custom Script.

In the query output there will be a combination of behavior/discipline data provided from the SWIS Referral System and similar data from your Student Information System.

If you need any assistance navigating this process, please refer to the link below that walks through the steps of using the manage custom exports functionality. Please do not hesitate to reach out to support@midatahub.org with any questions or obstacles, you encounter.

Credit to Brey Neville, Kentwood Public Schools for his valuable contribution to this document, testing of the import process, and the documentation (and process) found at the link below which describes using Powershell to automate the export process from SDEX

[MiDataHub - Powershell Script for exporting data from SDEX](#)