



Rsam Platform

Import using Configurable API Connectors Setup Guide

Version: 9.2 | March 2019

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About this Guide

This document provides instructions to set up configurable API connectors in Rsam and to import data from external sources into Rsam using those connectors. This feature will help in importing bulk data (import multiple records/objects or a single record/object with many attributes) in a single action.

Audience

The intended audiences for this document are the customers of Rsam, who can use this document to set up the configurable API connectors and use them during import. You can reach out to the Rsam Customer Support Team in case of any doubts or queries.

Import using Configurable API Connectors

Rsam now supports importing data from an external source using a custom-made API connector. The API connector acts as a bridge between Rsam and the external source to facilitate the import. The API connector must be configured by the Administrator to enable the connector to be used in Import. After the API connector is configured, it will be available for selection during Import.

Step by Step Procedure

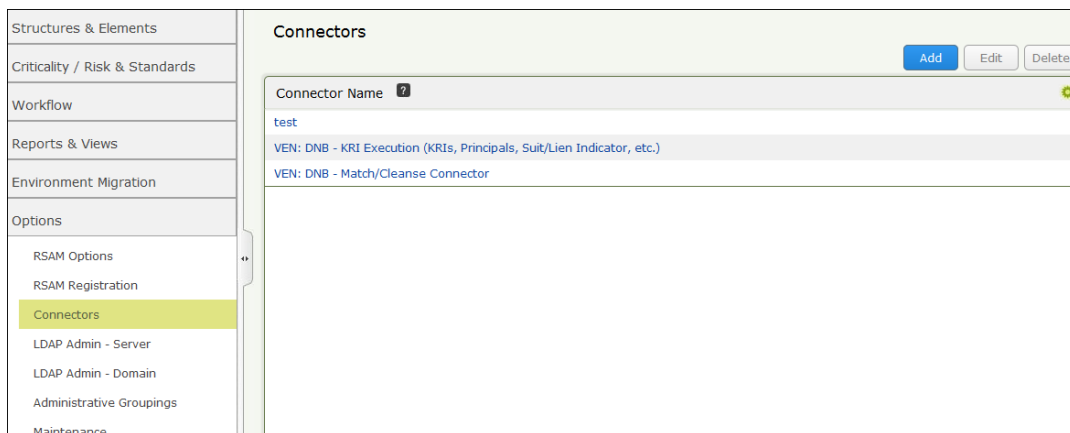
To import data from the external sources using the configurable API connector, you must perform the following steps:

1. [Create a Connector and Enable Its Use in Import](#)
2. [Use the Configurable API Connector for Import](#)

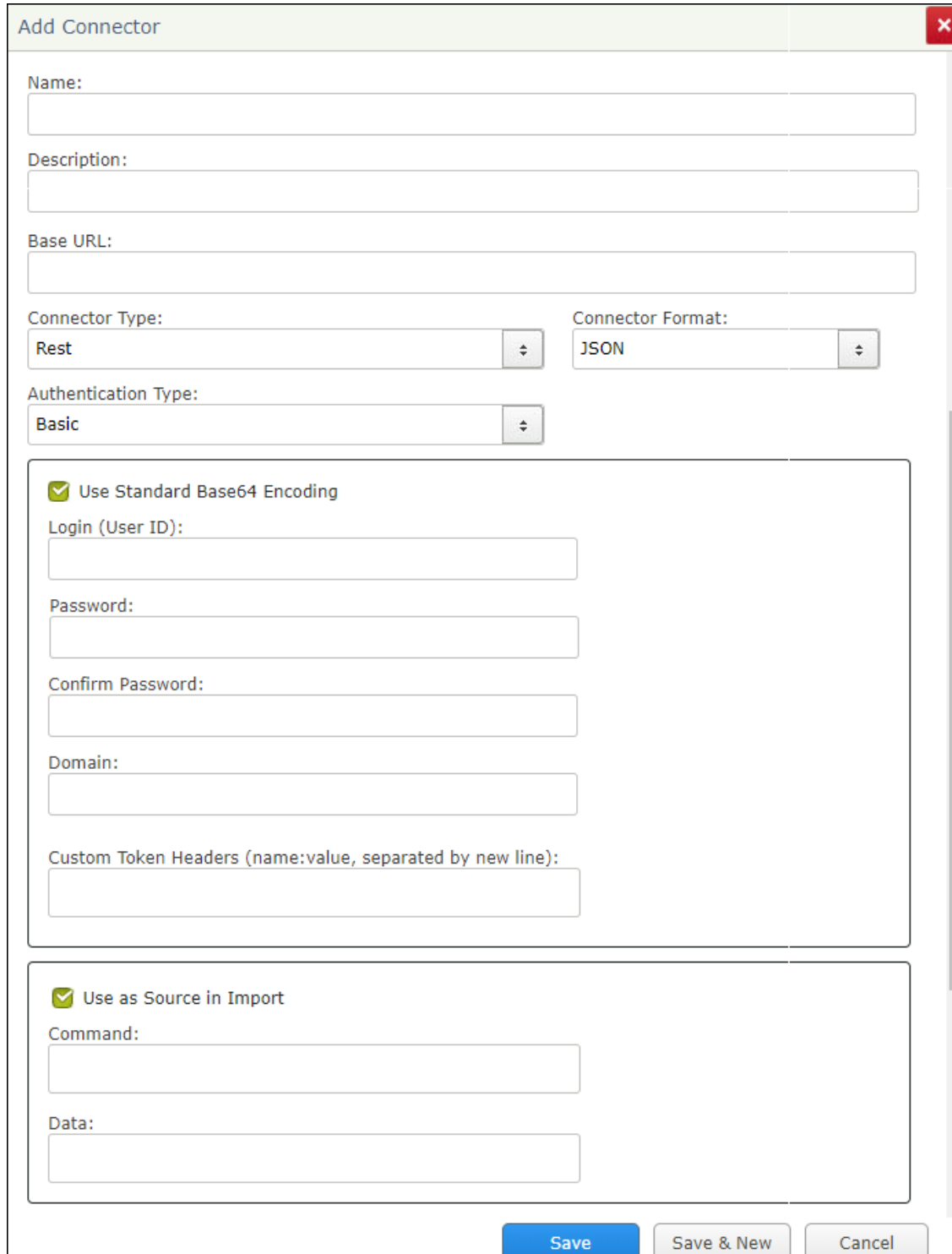
Creating a Connector and Enabling its Use in Import

Connectors specify how Rsam should connect and authenticate to external APIs. To add a connector, perform the following steps:

- a) Go to **Manage > Administration**
- b) In the left panel, click **Options > Connectors**



c) Click **Add** on the top right. The **Add Connector** dialog box appears.



The screenshot shows the 'Add Connector' dialog box with the following fields and options:

- Name:** [Text input field]
- Description:** [Text input field]
- Base URL:** [Text input field]
- Connector Type:** [Dropdown menu with 'Rest' selected]
- Connector Format:** [Dropdown menu with 'JSON' selected]
- Authentication Type:** [Dropdown menu with 'Basic' selected]
- Use Standard Base64 Encoding**
 - Login (User ID):** [Text input field]
 - Password:** [Text input field]
 - Confirm Password:** [Text input field]
 - Domain:** [Text input field]
 - Custom Token Headers (name:value, separated by new line):** [Text input field]
- Use as Source in Import**
 - Command:** [Text input field]
 - Data:** [Text input field]

At the bottom right, there are three buttons: **Save** (highlighted in blue), **Save & New**, and **Cancel**.

- d) Select the option **Use as Source in Import** to make the connector available during import.
- e) Complete all the other necessary fields in the dialog box.

The following table lists the fields available in the **Add Connector** dialog box.

Field	Description
Name	This is the name of the connector.
Description	A general description for the connector.
Base URL	<p>The web URL used to connect to the external API. This is the base (root) URL that will be used for all calls to this connector.</p> <p>Check the API documentation of your tool to determine the proper URL.</p> <p>Example: <code>https://www.example.com/services/search/jobs/key</code></p>
Connector Type	<p>The method used to connect to the external API.</p> <p>Check the API documentation of your tool to determine the proper connection.</p>
Connector Format	<p>This is the format used to pass data to and from the API.</p> <p>Check the API documentation of your tool to determine the proper format.</p>
Authentication Type	<p>Select the type of authentication use by the external API. Options include Basic, Session, Token, Bearer Token, and Key.</p> <p>Check the API documentation of your tool to determine the proper authentication.</p>
Use Standard Base64 Encoding	<p>Select this check box if the connector can encode user credentials in base64 format.</p> <p>Note: SharePoint does not support base64 encoding.</p>
Login (User ID)	This is the login ID of the account you wish to use when connecting to the API.

Field	Description
Password and Confirm Password	This is the password for the account you wish to use when connecting to the API.
Change Password	Enter a new password to change the existing password.
Domain	Enter the domain name.
Token Name	The identifier used to find the actual header name in API response that has token value returned from authentication call to generate token.
Token and Confirm Token	Enter a value to be stored in future API calls. This value must be entered in name:value combination, separated by new line.
Token Type	Enter the type of token.
Custom UID Name	The customer UID header name used to pass UID value to API call to generate token.
Authentication URL	The URL used to authenticate the user credentials.
Custom Password Name	The custom password header name used to pass actual password value to generate token.
API Key name from authentication	The key name used to determine the name of the key received from authentication call.
API Key name as call parameter	The key name used to set the name under which the key is sent to normal API call.
Custom Body	Enter any additional authentication parameters for the API. Example: <pre>{"grant_type": "client_credentials"}</pre>
Custom Token Headers (name:value, separated by new line)	Additional http headers that need to be passed. If specified, the headers should be passed with any API calls that uses a connector. If placeholder !USER_ID! is encountered in the key/value pair, it should be replaced with actual user Id at runtime prior to setting the HTTP header. Examples: Accept-Encoding: compress, gzip Accept-Language: da, en-gb;q=0.8, en;q=0.7

Field	Description
Use as Source in Import	<p>Select this check box to make the connector available during import. After this check box is selected, the connector will appear in the API Connector drop-down list during import.</p> <p>The Command and Data fields appear after this option is selected.</p> <p>Notes:</p> <ul style="list-style-type: none"> - When editing the Connector details, the option Use as Source in Import will be unavailable / disabled for the connectors which are already in use, that is either associated with a handler or associated with an import profile. - If the association of the connector is removed from the handler / import profile, then this option will be available again.
Command	<p>Provide the command you wish to execute in the API. This command will be appended to the Base URL.</p> <p>The Command field is mandatory and is available only when the option Use as Source in Import is selected.</p> <p>Examples:</p> <pre>export;/GET /services/search/jobs</pre>
Data	<p>Provide the body parameters to be sent to the external API. This will provide the API with the details required by the command.</p> <p>The Data field is available only when the option Use as Source in Import is selected.</p> <p>Examples:</p> <pre>exec_node=oneshot;output_mode=xml exec_mode=oneshot;output_mode=xml;search=search Database table host</pre>

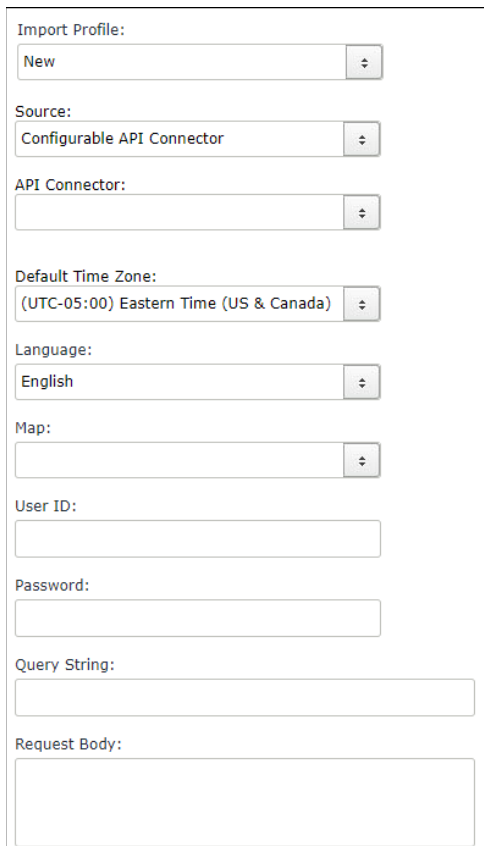
Notes:

- The fields related to the connectors that can be used in import are highlighted in green.
- Some fields in the above table are applicable to certain authentication types. Also, note that not all fields are required for all APIs.
- You can use formulas in the **Command** and **Data** fields, which will be evaluated before sending the request; but when a connector is enabled to be used in Import, there is a limitation where only 5 formulas are supported, which are as follows:
 - [??Current Date] and [??Current Time], which refer to the system date and time.
 - [??User ID], [??User Name], and [??User Email], which refer to the logged-in user details.

Using the Configurable API Connector for Import

To use the configurable API connector for import, perform the following steps:

- a) Go to the Import page.
- b) In the **Source** list, select the option **Configurable API Connector** and the fields available are shown in the following screenshot.



The screenshot shows a form titled 'Import Profile:' with the following fields:

- Import Profile:** A dropdown menu with 'New' selected.
- Source:** A dropdown menu with 'Configurable API Connector' selected.
- API Connector:** An empty dropdown menu.
- Default Time Zone:** A dropdown menu with '(UTC-05:00) Eastern Time (US & Canada)' selected.
- Language:** A dropdown menu with 'English' selected.
- Map:** An empty dropdown menu.
- User ID:** An empty text input field.
- Password:** An empty text input field.
- Query String:** An empty text input field.
- Request Body:** A large empty text area.

- c) Complete all the necessary fields in the Import page.

The following table lists the fields available in the Import page.

Field	Description
API Connector	<p>Select the API connector of your choice to import data. This field is available only when the Source selected is Configurable API Connector.</p> <p>Note: Only those connectors that are enabled to be used in Import will appear in this drop-down list (the option Use as Source in Import is selected in the Connector Admin page).</p>
User ID	This is the User ID to use in the connection.
Password	This is the Password to use in the connection.
Query String	<p>Provide the command you wish to execute in the API. This command will be appended to the Base URL and Command fields of the connector that has been selected in the API Connector drop-down list.</p> <p>Examples:</p> <pre>export/;GET /services/search/jobs</pre> <p>Note: If this field is empty, then the values in the Base URL and Command fields of the selected connector will be used.</p>
Request Body	<p>This is the <i>actual data</i> or <i>payload</i> being sent to the external API. This data will be appended to the Data field of the connector that has been selected in the API Connector drop-down list.</p> <p>This will provide the API with the details required by the command. This needs to be provided in the format required by the external API.</p> <p>Examples:</p> <pre>exec_node=oneshot;output_mode=xml exec_mode=oneshot;output_mode=xml;search=search Database table host</pre> <p>Note: If this field is empty, then the value in the Data field of the selected connector will be used.</p>

Notes:

- User ID and Password fields are not mandatory; however, when specified, these credentials will be used for the connection (overriding the credentials present in the Connector Admin page).
- You can use formulas in the **Query String** and **Request Body** fields which will be evaluated before sending the request, a total of 5 formulas are supported, which are as follows:
 - > [??Current Date] and [??Current Time], which refer to the system date and time.
 - > [??User ID], [??User Name], and [??User Email], which refer to the logged-in user details.
- d) Complete the rest of the import process in the usual manner. For information about the import process, refer the *Rsam Online Help*.