

Automatically Publishing Metric Data into AchieveIt

AchieveIt's Data Integration API allows you to import key business metric data from existing systems into your AchieveIt instance. Eliminate the need for users to enter data in multiple places, reduce errors, and save time. Your AchieveIt Integration Team will work with you through this process.

How It Works

01 Identify the data from your systems you'd like to publish in AchieveIt

Every organization tracks a variety of metrics inside their plans. The first step is to identify which metrics you're tracking in other systems – such as a financial system, CRM, or data warehouse. Think through how you would like each metric represented in AchieveIt.

02 Determine the unique ID for each metric

Your other systems will have unique identifiers for each metric, likely a long series of numbers and letters in a hidden field. Compile a list of unique IDs for the metrics you would like to push into AchieveIt and give that list to your Customer Success Manager (CSM).

03 Format your data into a CSV

To push your data into AchieveIt, you will need to put the data in a CSV (Comma Separated Value) format. You can find the template and more specifics on this process in [our API documentation](#).

04 Automatically publish the data from your systems on a regular schedule using our API

Determine the cadence with which you'd like to upload your metric data (such as weekly, monthly or quarterly). Since you'll be automating this process, you'll need to coordinate with your internal IT resources to determine the best way to aggregate and publish your data through AchieveIt's API.

05 Success! Information that flows in through the API updates your plan items in AchieveIt

Using the unique ID mapping you provided, AchieveIt will update all plan items with the provided data. Comments, metrics, and statuses will all update automatically in plans, reports, and dashboards. As you add new plan items and metrics in AchieveIt, let your CSM know and we'll update your integrations.

Example of Data Flow

Once you have completed these steps, the entire data flow will look something like the graphic below. In this example, there is a central program labeled “Data Extractor” that is pulling metric data from multiple customer systems on a schedule, combining it, converting it to the AchieveIt CSV file format, and publishing it to AchieveIt at one time. In your environment, you may decide to pull data from just one system or pull data from different systems at different times and publish it to AchieveIt separately.

AchieveIt will then insert each metric into the appropriate plan based on unique ID mapping you set up before you started publishing data. Within a few minutes, anyone with access to the plan will see the metric data appear in the appropriate plan item. Your AchieveIt CSM will work directly with your technical team to set up and test the right data flow for your environment. As your needs change, we’ll be there to help you add or change your data flows to keep your metric data flowing into AchieveIt.

