

Integration

The R3Dashboard.org application has a modular architecture that allows for the rapid development of new provider integrations. This document outlines the general project tasks of onboarding a new provider integration.

Initial Planning

1. Southwick sends provider integration specification documents:
 - New Integration Onboarding
 - Data Transmission Introduction
 - File Format Specification
 - Historical Data Request
2. Southwick, Provider, Pragmatim conference call to discuss planning and address any questions
3. Southwick sends provider Master License List spreadsheet template
4. Southwick, Provider prepare Master License List.

Development

5. Provider develops programs and processes to extract and deliver datafiles per file format specification
6. Pragmatim develops integration modules for new provider integration

Format Testing

7. Pragmatim configures SFTP server access and provides credentials to provider
8. Provider manually delivers test datafiles to SFTP server **development** folder
9. Pragmatim acceptance testing of provider datafiles
10. Repeat until acceptance format testing passes

Unit Testing

11. Provider delivers nightly datafiles to SFTP server **development** folder via automated process
12. Pragmatim unit tests new provider integration in development under controlled conditions
13. Repeat until unit testing passes

Integration/QA Testing

14. Pragmatim configures **staging** environment
15. Provider delivers historical datafiles to **development** folder per specifications in **Historical Data Request** document
16. Provider delivers QA data
 - Report of **annual license holder** counts by license ID or license type
 - Years 2020-2022
 - An **annual license holder** is someone who had at least one privilege-granting license of the ID or type that was active for at least one day in the calendar year.
17. Pragmatim loads historical data to **staging** environment
18. Provider re-points automated delivery of nightly files to SFTP server **staging** folder
19. Pragmatim observes end-to-end integration testing until satisfied that integration is operating successfully
20. Pragmatim performs QA testing of R3Dashboard summarized reporting against provided QA data

Deployment

21. Pragmatim configures **production** environment
22. Pragmatim moves historical data to **production** environment
23. Provider re-points automated delivery of nightly files to SFTP server **production** folder
24. Provider, Pragmatim agree on cutover date
25. Provider delivers 2023 catchup data file for period 2023-01-01 to cutover date to SFTP server **development** folder
26. Pragmatim loads 2023 catchup data in **production** environment
27. Pragmatim runs any remaining nightly datafiles received between cutover date and go-live
28. Pragmatim activates integration in **production** environment

Acceptance Testing

29. Once integration is running smoothly in production, Pragmatim provides provider with access to application to review data and approve access to stakeholders

Integration Development Notes

Regardless of Provider, the R3Dashboard application maintains a unique SFTP server account for each **state**. Providers that expect to (eventually) send multiple states' data to the R3Dashboard application should develop their integration programs and processes with this in mind, ensuring the ability to maintain separate access credentials by state and send separate nightly datafile sets for each state.

The SFTP server account file structure is identical for each state.