Automate This

Introduction

The purpose of this document is to provide information and examples on automating data publishing on the Socrata platform.

Resources

Python Library for new Publishing API (supports Transforms)

https://github.com/socrata/socrata-py <- New!

Python - Windows

https://www.python.org/downloads/release/python-370/

System Requirements

- ❑ A machine (app server, etc) **that can consistently run an automation job**
- ❑ **Python 3** installed on that machine that will run the automation
- ❑ **socrata-py python library** also installed on machine running the automation
- ❑ **Socrata credentials** stored as **Environment Variables** on the OS
- ❑ A task scheduler (Windows Task Scheduler, Cron) on the same machine

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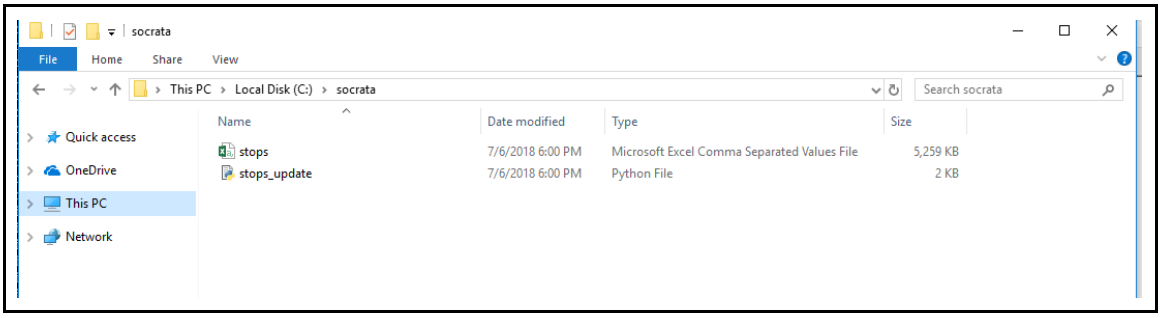
Set Up & Run

Steps 1-4 are one-time setup tasks. Steps 5-10 will be repeated for each automation job.

1. Install Python (version 3+)
2. Install socrata-py
3. Set up Environment Variables permanently on mac or windows
    a. MY_SOCRATA_USERNAME as the user variable name
        i. Enter a Socrata username as the value
    b. MY_SOCRATA_PASSWORD as the user variable name
        i. Enter the corresponding Socrata password as the value
    c. Note: you may need to restart your machine after this step.
4. Validate newly created Environment Variables
    a. Launch new Terminal/Command Prompt after setting them
        i. Mac: echo $MY_SOCRATA_USERNAME
        ii. Windows: echo %MY_SOCRATA_USERNAME%
5. Copy *Automate This* script from Socrata menu when creating or updating a dataset.
6. Paste the script into a file (perhaps an IDE like IDLE, or a text editor)
7. Save *Automate This* script in an appropriate folder, perhaps named Socrata



8. Update file path in the script to file that will be published to Socrata

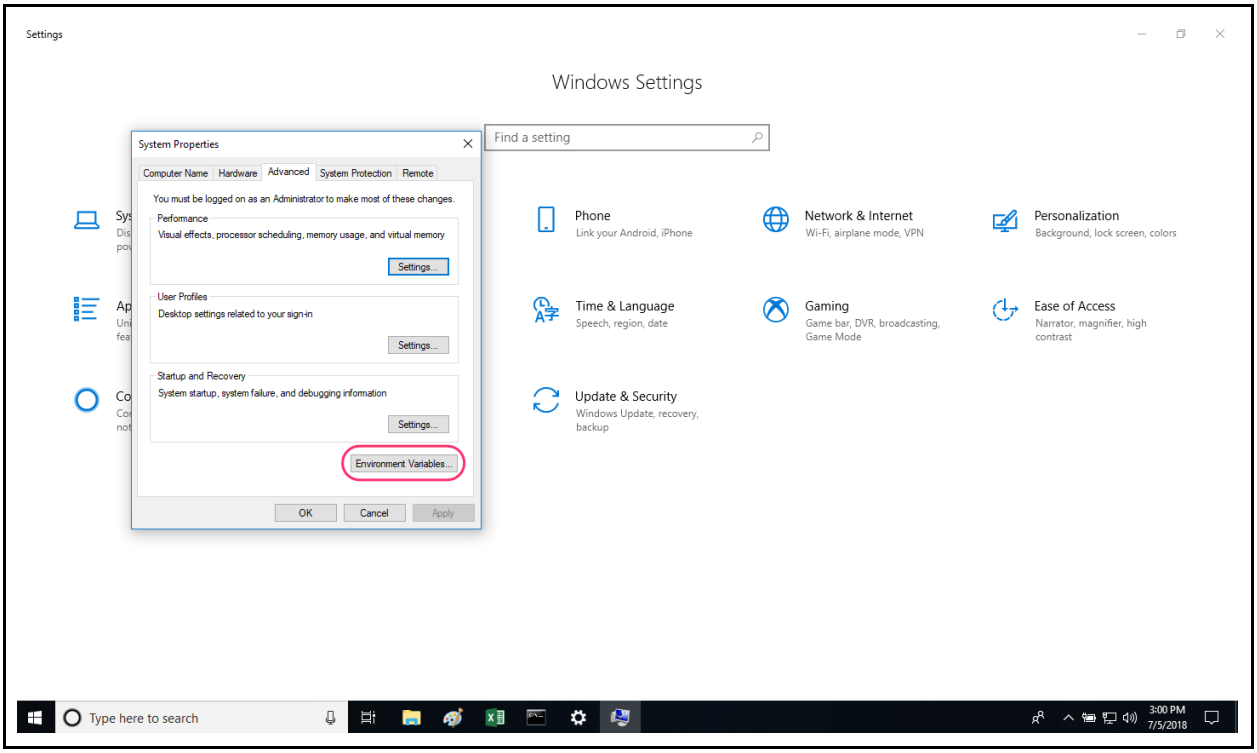
```
# set environmental vars for current user using >nano .bash_profile
auth = Authorization(
  'alicia-cloud.demo.socrata.com',
  os.environ['MY_SOCRATA_USERNAME'],
  os.environ['MY_SOCRATA_PASSWORD']
)

socrata = Socrata(auth)

(ok, view) = socrata.views.lookup('4vym-79aq')
assert ok, view

with open('/Users/alicia.brown/data/stops.csv', 'rb') as my_file:
  (ok, job) = socrata.using_config('stops_prior_2018_06-18-2018_99be', view).csv(my_file)
  assert ok, job
  # These next 3 lines are optional - once the job is started from the previous line, the
  # script can exit; these next lines just block until the job completes
  assert ok, job
  (ok, job) = job.wait_for_finish(progress = lambda job: print('Job progress:', job.attributes['status']))
  sys.exit(0 if job.attributes['status'] == 'successful' else 1)
```

9. Run script from command prompt/terminal/task scheduler: python stops_update.py
10. Voila!

Screenshots

Windows

Create New Environment Variable and Set Variable Value



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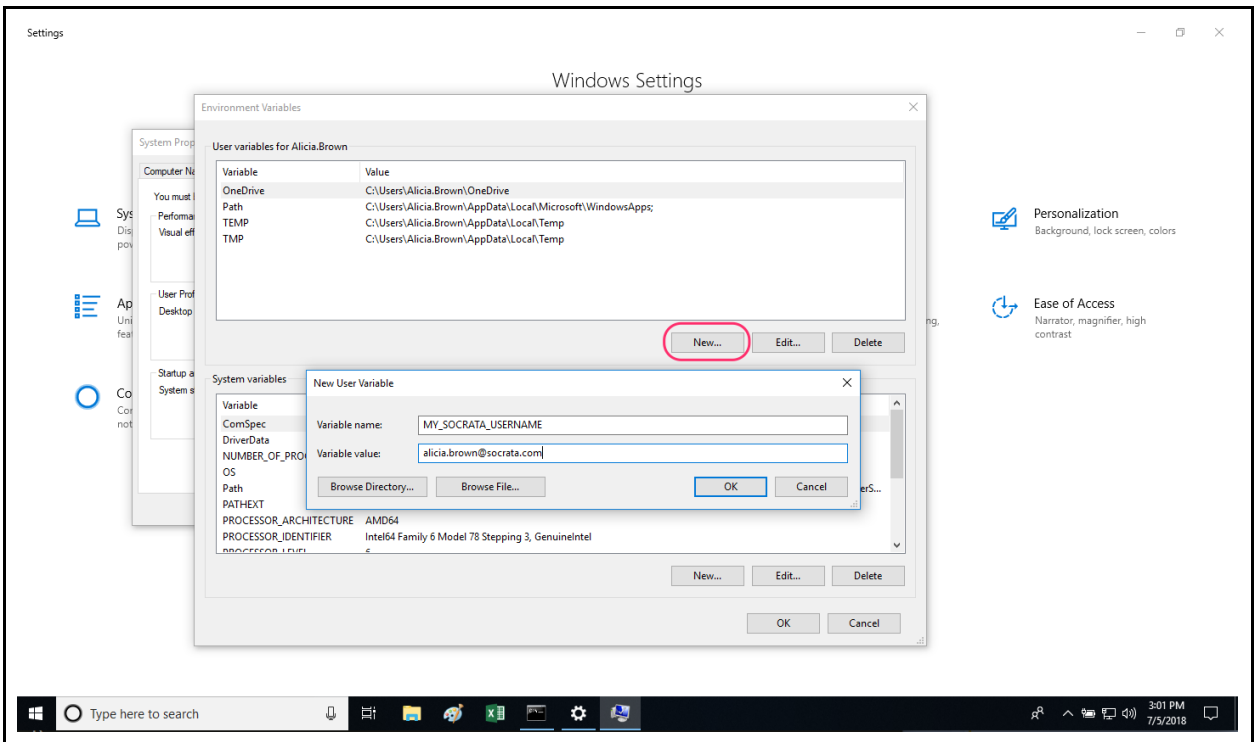
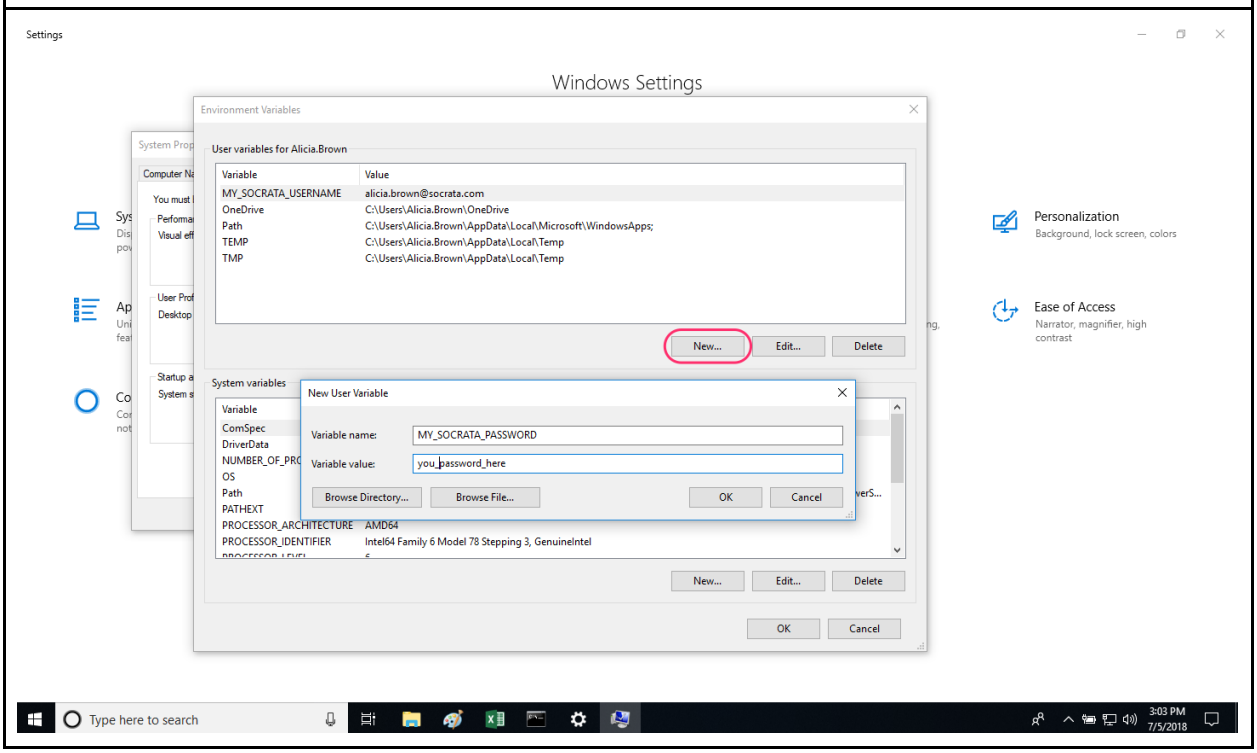
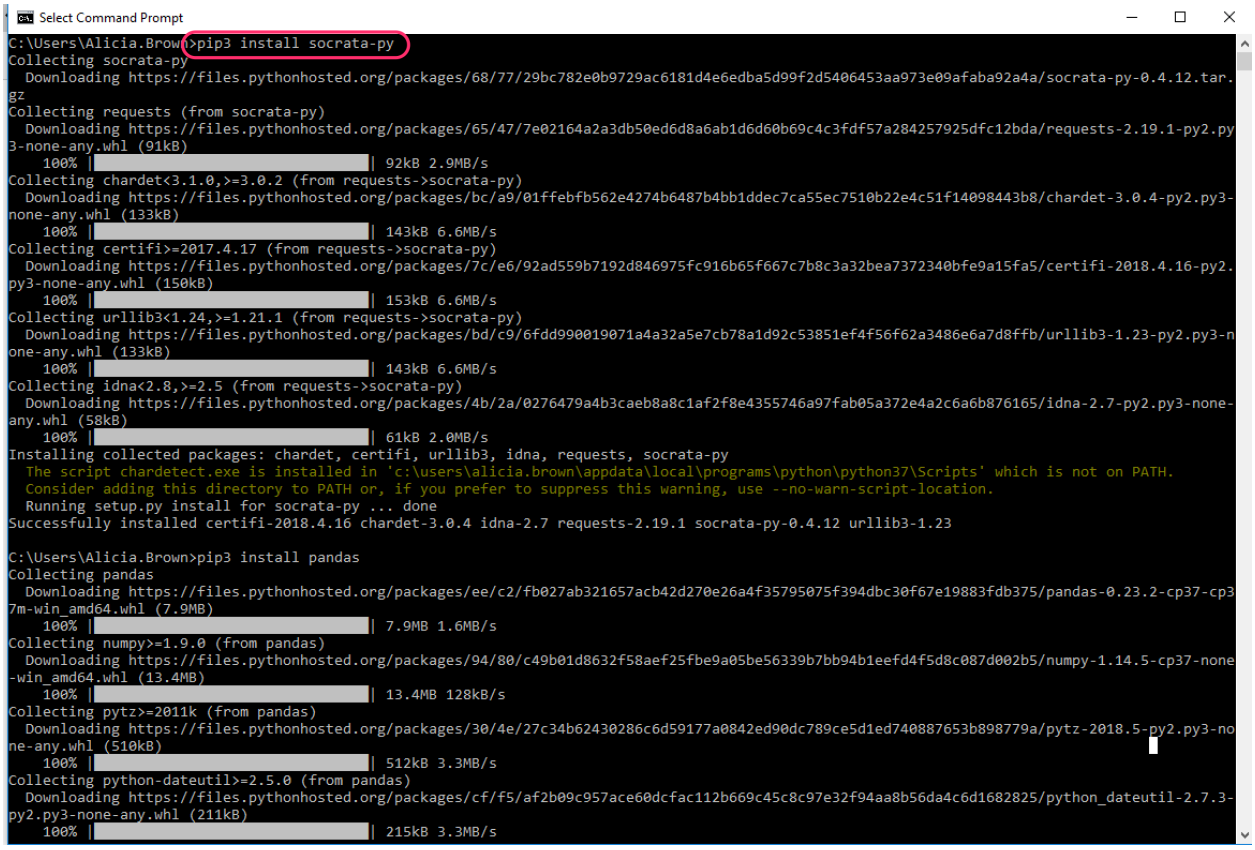




Install socrata-py

pip3 install socrata-py



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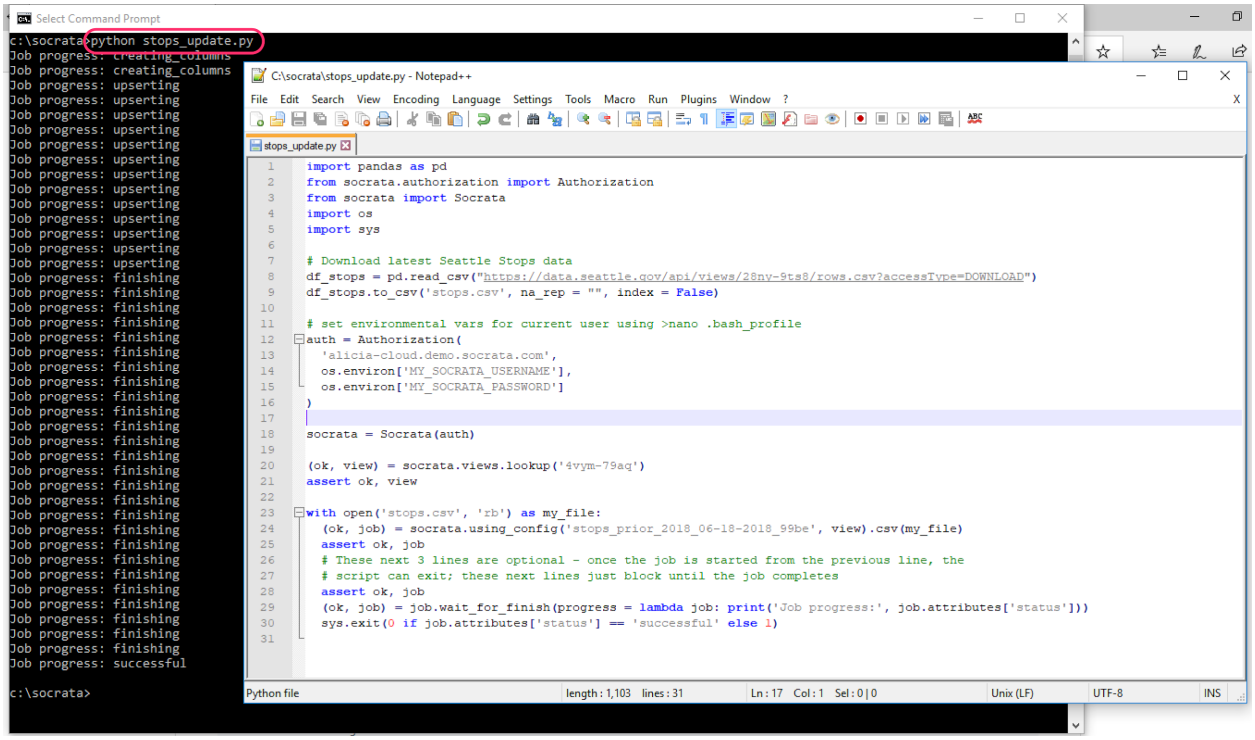
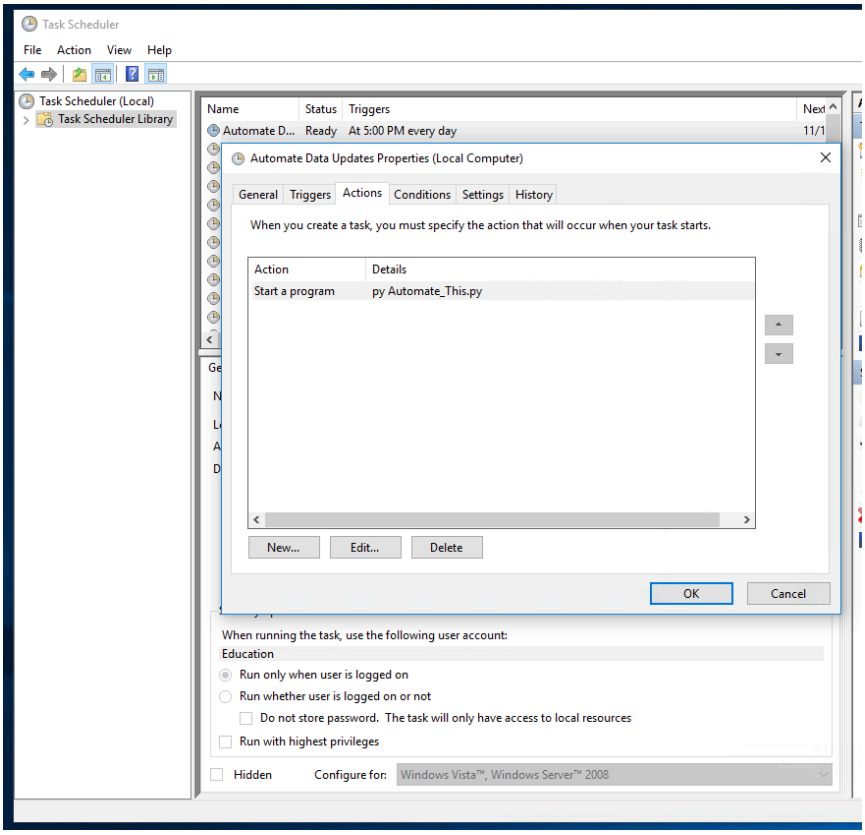
Run Automate This script



From Windows Task Scheduler



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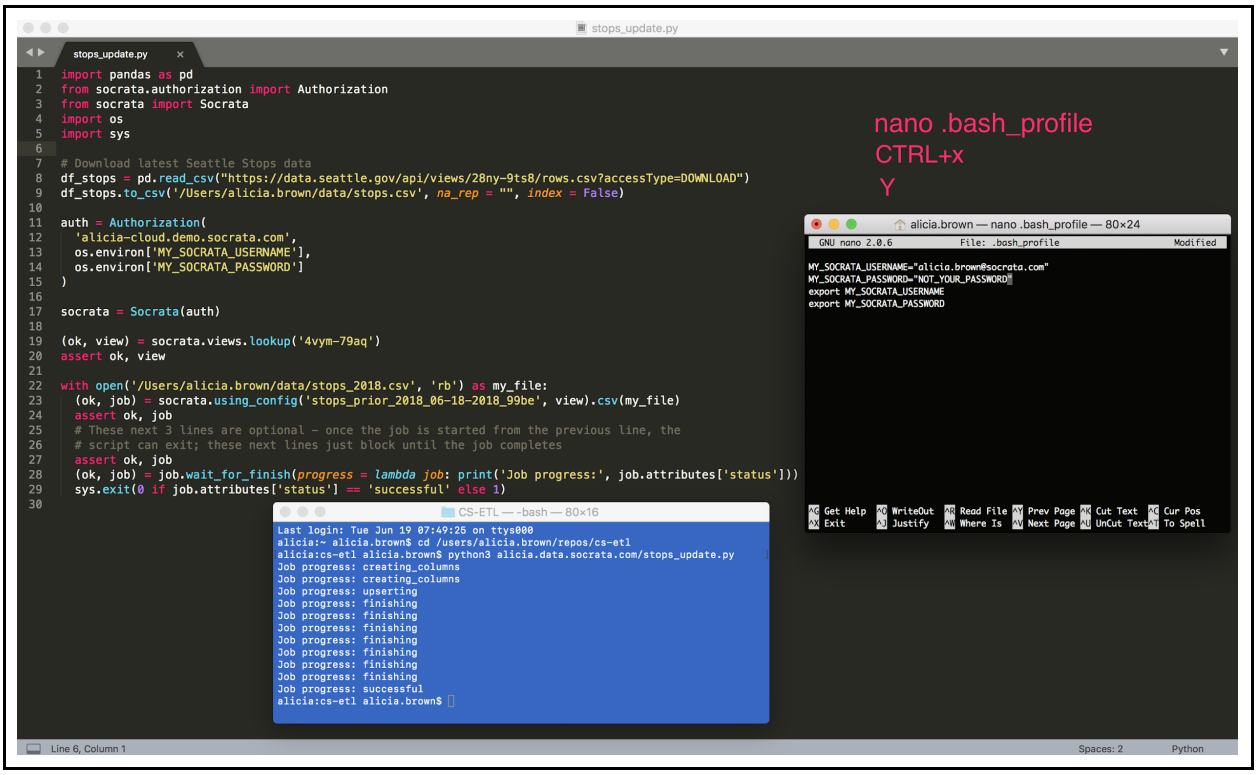
Mac



Environment Variables on a Mac are stored in .bash_profile