Working Together with Control: Using Fine-Grained Permissions in Terra Dotta Software

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Description

- Who needs what?
  - Learn how to grant access and limit permissions to your Terra Dotta system. This session will review common permission structures, as well as, new and unique features such as proxy registrations and principal/dependent registrations.

Who Has Access To The Terra Dotta System?

- Staff Admin > Staff Permissions
- 3 Default permission groups
  - **Facilitators -** Common Admins
  - **Recommender -** A type of staff user whose user record is created when an registrant requests a recommendation through the electronic process.
  - **Reviewers -** A type of staff user who logs in to the site to review registration (Read-only) and post their recommendation as to whether the registration should be accepted/rejected/waitlisted.
  - ***Custom**

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Custom Permission Groups

- Unlimited
- Should be configured for specific groups of users
- Function as Facilitators
- Demo

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Common Custom Permission Groups

- Program Coordinators/Faculty Leaders

- Directors/Department Chairs

- Campus Health Department Admins

- Partner Institution Admins

- Travel Approval (Reviewer)

- Group permissions | User permissions

Data Access Objects (DAO)

- 3 Types:
  - Access Restricted to Specified Programs and Applications
  - Access Restricted to Specified Profiles and Applicants
  - Access Restrictions to Data Objects
- Data Access Object restrictions apply when sharing queries and reports.
- IMPORTANT NOTE: Data Access Object restrictions do not apply to the Import/Export tool.

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Access Restricted to Specified Programs and Registrations

- You can limit a users access to specific programs, program groups, or providers.

- Users with this DAO will only be able to access the specified program and registrations to that program.

- For example:

Access Restricted to Specified Programs and Applications

Administrators that have these options assigned to their account will only see and have access to the programs and applications to those programs when using the Application Admin and Program Admin toolset.

▸ Program Name:
   Paris Semester Abroad - remove

▸ Program Group:

▸ Sponsor:

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Access Restricted to Specified Profiles and Registrants

- Users with this DAO will only be able to access registrations and profiles with the specified home institution or applicant parameter value.

- For example:

Access Restricted to Specified Profiles and Applicants

Administrators that have these options assigned to their account will only see and have access to the profiles and applications of users that match at least one of the assigned values when using the Profile Admin and Application Admin.

▸ Home Institution:

    LENOIR-RHYNE COLLEGE (HICKORY) - remove

▸ Applicant Parameter Value:

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Access Restrictions to Data Objects

- Users with this DAO will only be able to view the specified questionnaire or applicant parameter in registrations/profiles.
- For example:

Other Levels of Access

- Proxy Registrations
  - A proxy registration is a way to allow one person to submit travel plans on behalf of another person.

- Principal/Dependent registrations
  - Registrations and profiles can be 'linked' for organizational, administrative, and reporting purposes

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Proxy Registration

- Enabled under the OneStep tab of the program builder.

- Options:
    - Open Proxy registration (no admin permission requirement)
    - Proxy must be a member of a permission group
    - Registrant must be a dependent profile of the proxy

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Demo

- Standard Proxy Registration

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Principal/Dependent

- Able to link various registrations or profiles together in a principal-dependent relationship for organizational, administrative, and reporting purposes.

- Once linked, the principal registration/profile can be provided with access to view and edit his/her dependent records. (Setting)

- NOTE:
  - *registrations = registrations | profiles = profiles*
  - A principal record can have multiple dependent records.
  - Dependent record can only have one principal record.

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Proxy Registration with Dependents

- Example 1:
  - A coach's profile (Principal)
    - His/her players Profiles (Dependents)
- Example 2:
  - Faculty/Staff Submits Incident Report (Principal)
    - The Incident Report is then tied to the travel registration (Dependent)
- Demo

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Knowledgebase Articles

- https://tdsupport.force.com/support/articles/General/Principal-Dependent-Applications-Profiles

- https://tdsupport.force.com/support/articles/General/Proxy-Registrations

- https://tdsupport.force.com/support/articles/General/Managing-Staff-Permissions

- https://tdsupport.force.com/support/articles/General/Data-Access-Objects

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Questions?

- Please don't forget to fill out the session evaluation form
  - Session Title: Working Together with Control
  - Presenter: Chelsey Harwood

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