Tying It All Together

How Integrations Impact Your Use of Terra Dotta Software

Agenda

- What is an integration?
- Why should our institution integrate?
- How do we integrate?
- Troubleshooting
- Q&A

What is this "integration"?

- The combination of technical and business processes used to connect data from disparate sources into meaningful and valuable information

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Why should we integrate?

- Improved user experience

- Increased data integrity

- Reduction in administrative burden

Integration and Terra Dotta software

- User account creation
- Population of registrant data
- User authentication

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User account

- What is a user account in TDS?
  - Combination of user profile, applications, and authentication
    - Tied together by a UUUID (unique, universal, and unchanging identifier). EX: student number
  - Users have only one integrated TDS account

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User account creation

- When is a user account created in Terra Dotta?
  - Upon initial user login
  - Admin lookup
  - HR Directory search (Faculty/Staff only)

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User account data

- Required core fields:
  - First Name
  - Last Name
  - Email Address
  - Unique ID (UUUID)
- Optional Core Fields
  - DOB
  - Middle Name
  - Gender
 - Confidentiality Indicator

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How is data transferred?

- Data extract
  - Flat file transfer over SFTP (secure file transfer protocol)
- Each institution has a dedicated SSH folder (secure shell) where they send data for consumption by Terra Dotta software
- File received nightly by TDS, loaded into local tables and deleted from the SSH folder

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Types of data transfers
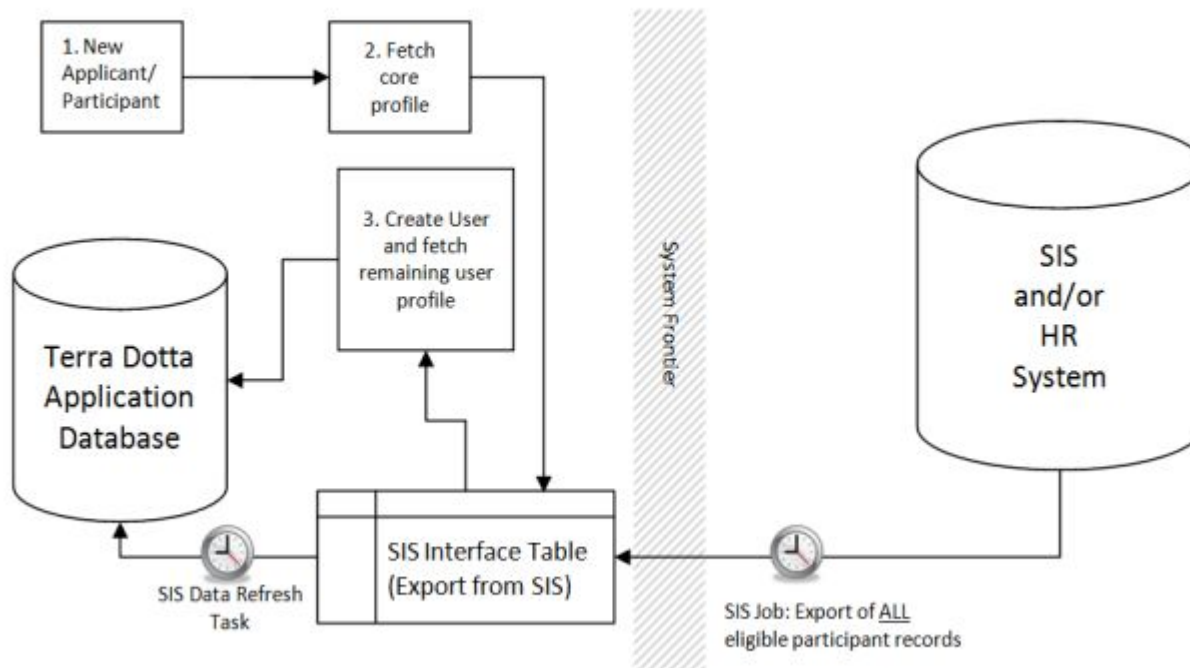
- Standard fetch
- Deferred fetch
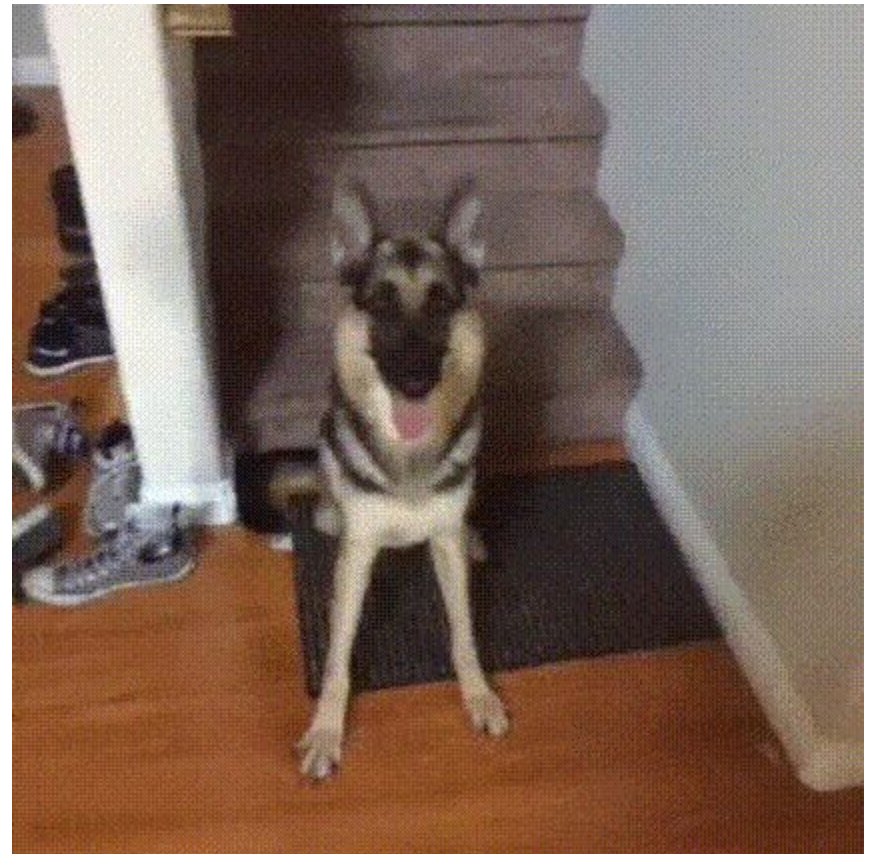
Standard fetch

- All desired fields for all potential students are made available to Terra Dotta software

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Standard fetch

Standard SIS Interface Configuration with Export Table
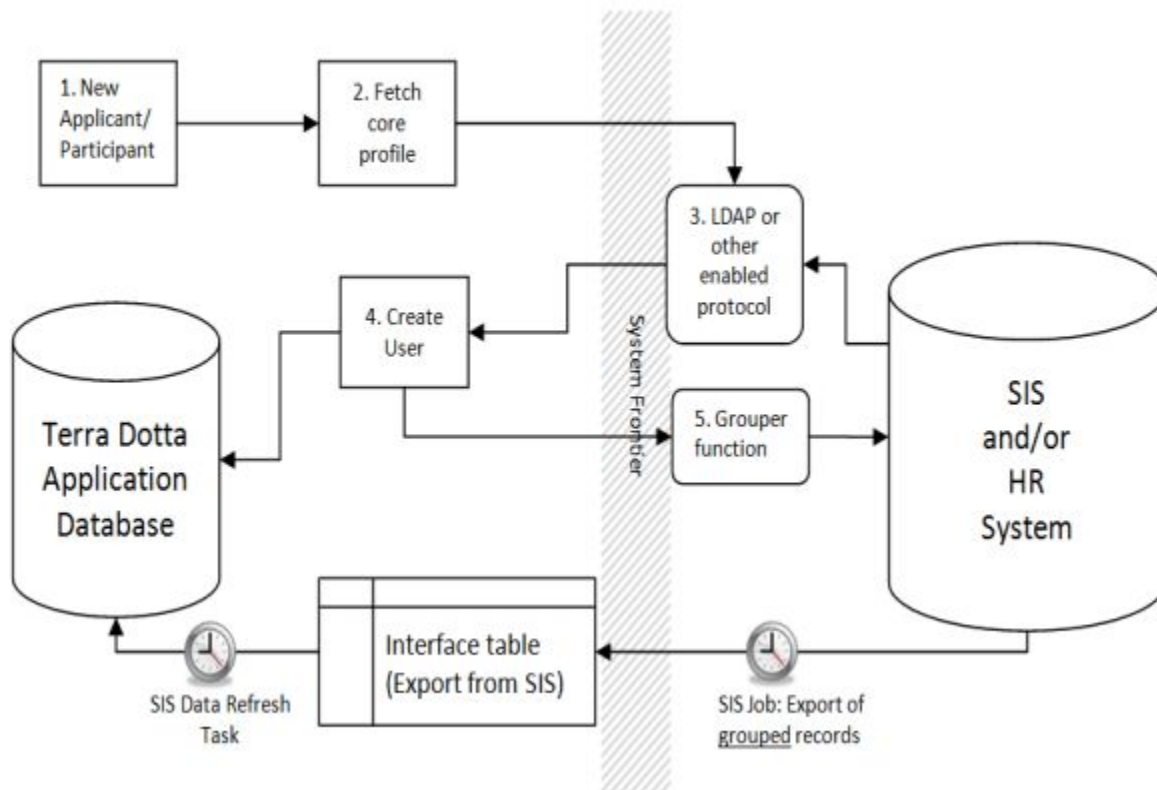Local to the Terra Dotta Application

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Deferred fetch

- Only required core fields are made available for all potential students
- After an initial login to Terra Dotta software, their other custom information will be loaded in a second flat file feed

Deferred fetch

Deferred-fetch SIS Interface Configuration

Updating active user data

- Profile data (data from the flat file feed) refresh occurs nightly

- Only "active" users are refreshed

- Active criteria is defined by your office:

  - Timeline can be set in System Settings > System Features > Registrants > SIS Mapped Parameter Data Refresh

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User authentication

- Terra Dotta supports
  - Integrated authentication (campus ID)
  - Local authentication (credentials created in Terra Dotta software using personal email address)

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Integrated authentication

- LDAP-S
- Shibboleth
- CAS
- Terra Dotta is a member of InCommon POP

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Local authentication

- User receives temporary password

- Password management in TDS:
  - System Settings > System Features > Administrative > Password Management
    - Password strength
    - Longevity (in days)
    - IP blocking
    - Password reset

Checking account types

- You can verify whether a user account is integrated (campus-based) or local by visiting: Maintenance > Edit User and searching for the user of interest

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Troubleshooting

- Failed Login
  - Integrated
  - Local
- Profile data not refreshing

gifbin.com

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Failed login - integrated

- Verify username and password
- Verify they are trying to initiate a registration or that they have an existing one
- Check that site registration is active (System Settings > System Features > Features > Site Registration Option)

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Failed login - integrated

- Check Maintenance > SIS/HR Tests to see if their info is being provisioned to TDS. If not, consult campus IT

- Check Maintenance > Login Attempts for further information about the error

- Check Maintenance > Edit User to ensure they are an integrated user

- If your site uses a split login, ensure they are using the correct link

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Failed login - local

- Verify they are trying to initiate a registration or that they have an existing one
- Check that site registration is active (System Settings > System Features > Features > Site Registration Option)
- Check Maintenance > Edit User to ensure they are using the correct username

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Failed login - local

- Make sure they are not trying to login with an expired temporary password (temporary passwords are valid for 24 hours by default. Temporary password validity can be edited under System Settings > System Features > Administrative). Reissue password if necessary under Maintenance > Edit User

- If your site uses a split login, ensure they are using the correct link

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Profile data not refreshing

- If using deferred-fetch, let the overnight process run and check again tomorrow

- Check Maintenance > SIS/HR Tests to see if the data is being provisioned to TDS

- Ensure the user record is active

  - Check travel dates/if they are still in the refresh window

Q&A

Please complete the session evaluation

- **Session title:**
  - Tying it all Together
- **Session presenter:**
  - Daniel Bullins

Resources

- http://techdocs.terradotta.com/
  - Follow the left-hand menu for specific information on different processes referenced in this presentation

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