Go Fetch!
How Integrations Impact Your Use of Terra Dotta Software

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What is integration?

- Mechanisms in Terra Dotta software which enable:
  - User account creation
  - Population of registrant data
  - User authentication
- Integration ties TDS with your institution's data system, which enables:
  - Improved user experience
  - Increased data integrity
  - Reduction in administrative burden

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USER ACCOUNT CREATION

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User Account Creation

- What is a user account in TDS?
  - Ties together a profile, authentication, applications, permissions, etc.
    - Key element is the User Name (Unique, Universal, and Unchanging ID)
  - Distinct from the user's institutional internet account and institutional data record
    - Related because of the UUUID
  - Users have only one integrated TDS account
- User creation occurs when TDS creates a local user account using "core" profile information

User Account Creation

- Core profile data always includes:
  - First Name
  - Last Name
  - Email Address
  - Unique ID (UUUID)
- Optional additional core data:
  - Date of Birth
  - Middle Name
  - Gender
  - Confidentiality Indicator

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When does user account creation occur?

- At first login attempt
  - Beginning a registration / application
  - Requesting an advising appointment
  - Requesting information
  - If enabled, creating a standalone user profile
- Administrator lookup
  - An admin or proxy user creating an application for a new user
  - An admin creating a profile for an applicant (if enabled)
  - An admin adding a new staff member via HR lookup
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How is data transferred?

- The typical connection is via a text file that is exported daily by campus IT and sent to TDS via a secured remote folder (SSH folder)
- Depending on your integration setup, this file might simply contain core information (Name, Email, UUUID) or it might contain additional custom parameters
- TDS receives this file each night, builds its local database tables, and then deletes the file

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IMPORT OF REGISTRANT DATA

Import of Registrant Data

- The process of completing the users' profiles with the remainder of the core and custom data that is delivered into TDS

- Depending on your integration setup, this can happen in two ways:
    - Standard: profile completion occurs at the moment a user account is created
    - Deferred fetch: profile completion occurs the next day

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Import of Registrant Data

- Profile refresh occurs nightly
- Only "active" registrants are refreshed
    - "Active" status is defined by several criteria. Typically, registrants remain active until their return date plus x number of months
    - Exact timeline defined in System Settings > System Features > Registrants tab

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Standard vs. Deferred Fetch

- ## Standard Fetch
  - All potential user data is provisioned to TDS, so profile data population occurs immediately

- ## Deferred Fetch
  - Only active user data is provisioned to TDS
  - After a user record is created, TDS requests applicant data from the campus data system overnight
  - Therefore, custom profile data (major, GPA, department, etc.) will populate the following day

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USER AUTHENTICATION

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User Authentication

- TDS supports remote (campus) authentication, as well as local authentication

- When users log in for the first time, users self-identify whether they will log in with campus credentials or create a local username & password.

- They also specify if they should be considered an "internal" or "external" applicant

User Authentication

- You can verify whether a user account is integrated (campus authenticated) or non-integrated (locally authenticated) in Maintenance > Edit User

TROUBLESHOOTING

"I can't log in!"

- A user reports that they cannot log in
- Steps to troubleshoot vary depending on whether they are using campus credentials or a local (non-integrated) user account

"I can't log in!"

- Non-integrated user
    1. Make sure they are trying to initiate a new registration/application, or that they already have an existing one. Alternatively, make sure that Site Registration is active on your site (System Settings > System Features > Features)
    2. Search for the user in Maintenance > Edit User to check the correct username.
    3. Make sure they're not trying to log in with an expired temporary password. If necessary, reissue the password (Maintenance > Edit User)
    4. If your site uses a split login link, ensure that they're using the correct link

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"I can't log in!"

- Integrated user
  - Make sure they are trying to initiate a new registration/application, or that they already have an existing one. Alternatively, make sure that Site Registration is active on your site (System Settings > System Features > Features)
  - Verify that they are using the correct username/password (if there are multiple types of accounts on your campus)
  - Check Maintenance > SIS/HR Tests to see if their info is being provisioned to TDS. If you can't find their record, check with campus IT

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"I can't log in!"

- Integrated user (cont.)
  - Check Maintenance > Login Attempts for more information about the error
  - Search for the applicant in Maintenance > Edit User. If they appear as Non-integrated, switch them to Integrated and correct their username
  - If your site uses a split login link, ensure that they're using the correct link

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Profile data not refreshing

- A user's SIS-integrated profile data is not populating, or is not up-to-date
  - If your site uses deferred-fetch integration, 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 that the user record is active. Make sure their dates of travel are in the future, or that they are still within the refresh window

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Questions?