



COURSEDOG INTEGRATION OVERVIEW

OVERVIEW

At a high level, the integration process for all SIS involves GETs and POSTs both being implemented and QA'd in Staging, which is then followed by a singular push to Production. Most commonly, the integration timeline is as follows:

Workshop	Description & Key Deliverables	Duration	Member Resources	Outcome
Project Kickoff	Introduction to your Coursedog service and the project teams. Review best practices. Review scope, roles and responsibilities.	1 hr	All project stakeholders including select Department Head(s) as available	Roles, responsibilities, key milestones and project implementation process understood by all
Technical Discovery Session	Gain a better understanding of your technical landscape. We will discuss your current set-up, customizations, security, and integration preferences.	1-2 hrs	Technical Teams	Roles, responsibilities, key milestones, project implementation, and technical architecture
Planning & Design	Review of current scheduling practices. Coursedog to make best practice recommendations with the goal of a mutually agreed upon design.	5-15 hrs	Functional & Technical Teams	Delivery a complete design document and project strategy
Data Workbook Session	Understand how your institution stores and maintains the following data: sections, courses, departments, buildings, rooms, instructors, and terms.	2-4 hrs	Technical Teams	Clearly identify proposed solution architecture based on the outcome of the sessions
Install & Configuration	Configure the application per the mutually agreed upon design document. Install Coursedog SIS Connector package.	3-4 months	PeopleSoft Developer PeopleSoft Admin System/Network Admin (oncall) DBA (oncall)	Integrations Data Mapping/Workbook Scheduler Configuration (Policies, Workflows) SSO
Training	Staff are trained on the Coursedog platform. Staff leads are able to train end users on how to configure the platform.	3 hrs	Functional	Requirement: Prior Workshops are complete Trained Registrar Staff Training material delivered Support Overview
User Acceptance Testing	Complete the Testing Workshop.	2 hrs	Functional	Completed Test Plan
*Production Migration	Coursedog and University migrate respective services into Production. This stage may include migration to various lower environments (e.g. staging).	1-14 days	SIS Developer Functional	Migrated application and successful production validation test
Go-Live	Migration to Production is complete and ready to begin using the platform.	30 mins	Functional	POC transitioned to Customer Success

STAGING

- Coursedog works with your data engineers (DBA) and functional teams to perform a data workbooking session.
- Client configures Single Sign On (SSO) with the Coursedog Toolset (if applicable).
 - Coursedog supports SAML and CAS.
- Coursedog works with your IT team to install the SIS connector.
 - API delivers both the GET and POST Staging APIs in one go. This process to get the client system configured and the APIs delivered usually takes a few weeks.

TESTING

- Coursedog executes an initial QA of Data imported into Coursedog (GET data) based on the data workbook.
- Perform a joint review session with client to execute User acceptance testing (UAT) of GET data on Staging.
- Performs joint validation meetings with the client to validate POST data.
- Client agrees to move forward with Production deployment (configuration Complete).

PRODUCTION

- Coursedog delivers APIs for Production.
- We clone Staging to Production and connect the APIs.
- Full QA of GET data on Prod.
- Joint testing/validation meetings with the customer to test POSTS.
- Sign off.

The source of truth, or system of record, is configurable on a field by field basis, for example:

- The call number of a section is defined as an SIS owned field (the SIS is always the source of truth for the call number).
- The classroom that a section meets in is defined as shared ownership between the SIS and Coursedog with Coursedog as the main source of data entry.

GENERAL INTEGRATION RULE

While Coursedog is fully configurable to support all types of integration scenarios, as a general rule:

- The SIS and Coursedog jointly own the definition of and attributes related to sections –with Coursedog being in the business of section creation and section update related to scheduling.
- The SIS owns the existence, definition, and attributes/fields of the following entities: terms, buildings, rooms, departments, instructors and courses.
 - In other words, you won't go into Coursedog to create or update any of these entities.
 - If you have bad data in the SIS for the above entities then you will correct it in the SIS.
 - For example, a registrar would not create a room, building, department or course directly in Coursedog but would do so in the SIS knowing that those creation events would flow from the SIS into Coursedog automatically via the nightly synchronization.
 - I.e. A registrar would not create an instructor or change their last name or assigned departments directly in the Coursedog UI but would go to the SIS to make those changes, again knowing that such changes will flow into Coursedog automatically.
 - I.e. If instructor status information is unreliable in the SIS then go through a concerted effort to correct it in the SIS –to designate instructors who have left the institution, deceased, retired, gone on leave etc. correctly in the SIS.

EXCEPTIONS TO THE GENERAL INTEGRATION RULE

There are two types of exceptions to the general integration rule above:

1. Internal Coursedog Fields: Coursedog stores additional attributes/fields in and around all entities. These internal fields are never sent to the SIS and will always be listed as exceptions in the screenshots below.
2. Fields that the SIS would normally own but will never have good data for AND that you want to update directly in the Coursedog UI so that your schedulers have good information in front of them when making scheduling decisions. Note that only in the case of Sections are any such field updates ever sent back to the SIS. For example, you could go through a concerted effort to update all room feature information directly in Coursedog knowing that room updates are never sent to the SIS.