

Transfer Portal Export Automation

The following document outlines EAB's current approach to automating Transfer Portal exports to a partner owned SFTP server.

Current process to export transfer portal data:

At the moment, each partner manually export data from the Transfer Portal. They determine who owns this process, frequency of exports, filter type, and filter date, for each export.

The aim of process described below, is to automate these data exports, and help reduce the manual effort spent by partners.

Step 1. Initial SFTP Configuration (EAB backend setup)

Once an SFTP server is set up on the partner's end, they can choose between two methods listed below to setup a connection between their SFTP server and EAB:

Type 1. Password

a. Partner owns creating a password and securely sending it to EAB

Type 2. Public/Private Key

a. Public Key: EAB will create and securely send to partner

b. Private Key: EAB will maintain. This will not be shared externally

Type 1 or 2 will be determined based on the partner's SFTP server setup and are used in conjunction with a hostname and username to connect to the SFTP server.

EAB then requires the information listed below from the partner to configure the SFTP server on the EAB admin page:

1. Hostname: IP address of the partner's SFTP server (configured by partner)
2. Username: TBD (configured by partner)
3. Password: (Partner to provide if connection Type 1 is chosen above)
4. Base target path: Location on the SFTP server where the files will be sent to (configurable by partner)
5. Filter Type: Partner chooses one: Profile Creation Date (PCD), Last Login Date (LLD) or None. If None, all data will be sent. For PCD and LLD filters, the date range will be between the time the last job ran and the current time. If PCD or LLD is configured for the first time and there are no previous jobs, a warning message will be shown notifying the user that all data will be sent only during the first job.

On the EAB admin page, the partner's SFTP connection details will be configured.

Step 2. Scheduler Job Configuration

After the SFTP configurations are in place, a scheduler job will be configured.

Partner will provide the days, and times at which they would like the export files to be delivered to their server. EAB will then configure an automated job to deliver files at these specified times. The automation can run as frequently as the partner wants, though due to the file size, spacing out the loads to allow load time should be considered. Partner will notify EAB with frequency.

Based on this schedule, the partner would then have to configure an automation on their end to pick these files from their SFTP server and load to their CRM.

Step 3. Running the export automation

When the job is kicked off, the csv exports will be sent to the base path defined in the SFTP configuration above, and a human readable timestamp folder name will be appended to the base path to uniquely identify the files in each job.

Path examples:

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_RESOLVED_PENDING_COURSES_03_02_2022_20_12.csv

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_PROSPECTIVE_STUDENTS_03_02_2022_20_12.csv

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_PENDING_COURSES_03_02_2022_20_12.csv

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_OTHER_CREDITS_03_02_2022_20_12.csv

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_MAJORS_03_02_2022_20_12.csv

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_COURSES_03_02_2022_20_12.csv

test_sftp/03_02_2022_20_12/EAB_Transfer_Portal_COLLEGES_03_02_2022_20_12.csv

Here, 'test_sftp' is the base path provided by the partner

The below items will be delivered to the base path with each run of the automation:

- 1 folder (From the example above, folder name = 03_02_2022_20_12)
- All the 7 csv files (listed above) will be in this one folder

The time stamp on the folder and csv files is based on UTC time. This time stamp is the time at which the automation job completes its full run.

Note: We find that delivering files in this format, provides a good way to structure the files delivered with each export, especially for cases where an export job may be scheduled to run twice a day. This structure would be helpful when the partner filters across files delivered to the base path, and the folder name would allow them to filter out and use csv exports from the exact timestamp they would like to look at.