



experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023



What I Wish I Knew: How to Prepare Your School for a Successful Slate and CAS Integration

Susan Gutierrez and Kate Owen-Killgrove | February 15th | 3:45 - 4:30 p.m.

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Agenda



- Benefits of the Slate/CAS integration
- How to decide if it's right for your school
- What the integration does and how it works
- A realistic timeframe from beginning-to-end
- Overall process and steps
- Data mapping
- Expected challenges
- Technical pieces of the integration
- Community Support/for Slate/Liaison CAS users
- Q&A



Panelists



Susan Gutierrez
Sr. Business Analyst



Kate Owen-Killgrove
Implementation Consultant



Robert Ruiz
VP, Strategic Enrollment





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- In the heart of Silicon Valley—the world's most innovative and entrepreneurial region
- Our curriculum blends high-tech innovation with social consciousness grounded in the tradition of Jesuit, Catholic education
- 5,571 Undergraduates
- 2,975 Graduates

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*Source: LinkedIn data. Spring 2020

Benefits of CAS/Slate Integration



- Allows in-progress and applicant data in near real-time
- The CAS API pushes data directly to Slate
 - No need for a developer to write a script to automate the transfer of data and documents
 - Technical work is required to set up the CAS API to deliver your data and documents, but your Liaison Implementation Consultant will help you get through that without needing your IT department
- Use of standard source formats offers the most common data points
 - bio/demo, contact, education history
 - pre-mapped, making it that much easier for you to get up and running

Benefits of CAS/Slate Integration (cont.)



- One-time set-up
- Allows use of Slate tools:
 - Drip Marketing
 - Events
 - Custom portals
 - Advising Appointments and Interviews
 - Reporting



But...is it right for my school?

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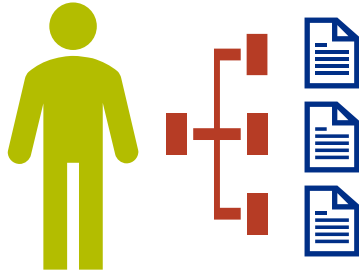


Questions to ask yourself:

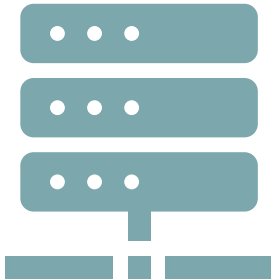
- Am I using WebAdMIT to review applications?
- Do I have a software developer available for my integration project?
- Am I trying to transfer MCAS?
- Does my CAS require me to record decision code in WebAdMIT for reporting purposes?

What Does a Data Integration Do?

It takes **Person** and **Application** records

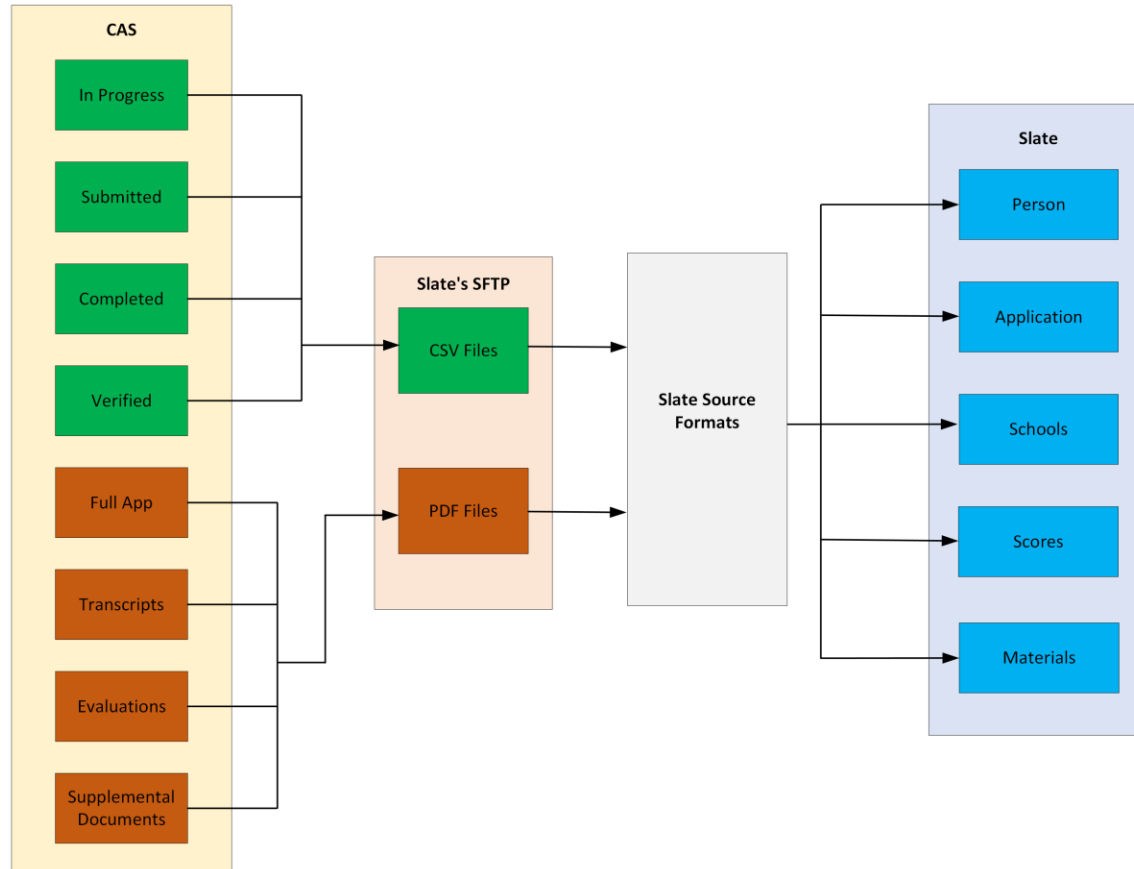


from the **CAS** System and Moves them



so that your
People can
do their
Work

Data Integration Workflow



How it Works



- CAS data is pushed to Slate using a CAS API subscription and delivered directly to Slate located in the SFTP Explorer
- CAS API delivers the data and documents to Slate SFTP Explorer
- The data and documents are then imported through an automated process and picked up by Source Formats
 - Source formats import data in a standardized way for scheduled or recurring imports
 - These standard Slate source formats were established using data and documents from BusinessCAS, EngineeringCAS, and GradCAS

How it Works (cont.)



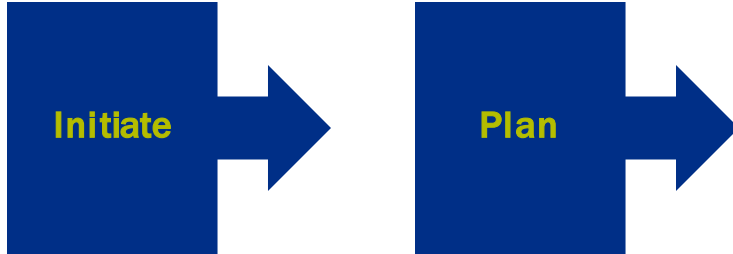
- The bulk of the work is not technical; it's understanding your admissions process
 - What you want to do with the data
 - What data do you need to move
 - How often does data needs to move
- Your Liaison Implementation Consultant provides planning, instruction, and support



Planning and Timeline



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- Assemble the team
- Read Liaison documentation
- Read Slate documentation
- Review current CAS configurations; must be complete and at least 1 program must be active
- Consider the timeline; usually a 12-week plan
- Identify what data points need to be loaded
- Configure CAS application to match your data requirements

WBS	Task	Task Status	Pct. Comp.	Adjusted Duration	Calculated Start Date	Calculated End Date	Aug 22	Aug 29	Sep 5	Sep 12
5-1-5	Establish-Data Integration-Timing	Done	100%	4w	7-Jun-2021	11-Jun-2021				
5-1-6	Establish-Data Integration-Frequency	Done	100%	4w	7-Jun-2021	11-Jun-2021				
5-1-7	Conduct-Local Systems-Assessment	Done	100%	4w	7-Jun-2021	11-Jun-2021				
5-2-	Planning	Done	100%	5d	14-Jun-2021	18-Jun-2021				
5-2-1	Determine-Data Elements-Required	Done	100%	4w	14-Jun-2021	18-Jun-2021				
5-2-2	Map-Data-Elements-to-Source-Fields	Done	100%	4w	14-Jun-2021	18-Jun-2021				
5-2-3	Plan-Data-Integration Workflow	Done	100%	4w	14-Jun-2021	18-Jun-2021				
5-2-4	Update-CAS Configuration Strategy	Done	100%	4w	14-Jun-2021	18-Jun-2021				
5-2-5	Finalize-Integration Plan	Done	100%	4w	14-Jun-2021	18-Jun-2021				
5-3-	Execution	Done	100%	35d	21-Jun-2021	6-Aug-2021				
5-3-1	Create-Test Application(s)	Done	100%	2w	21-Jun-2021	2-Jul-2021				
5-3-2	Build-Exports	Done	100%	4w	21-Jun-2021	16-Jul-2021				
5-3-4	Build Transformations	Done	100%	2w	19-Jul-2021	30-Jul-2021				
5-3-5	Configure-Data-Load	Done	100%	2w	19-Jul-2021	30-Jul-2021				
5-3-6	Review-Data-Lead	Done	100%	4w	2-Aug-2021	6-Aug-2021				
5-3-7	Build-Automation(s)	Done	100%	0	6-Aug-2021	6-Aug-2021				
5-4-	Performance-and Monitoring	Done	100%	20d	6-Aug-2021	3-Sep-2021				
5-4-2	Test-Data-Integration	Done	100%	2w	9-Aug-2021	20-Aug-2021				
5-4-3	Establish-Emergency Procedures	Done	100%	2w	23-Aug-2021	3-Sep-2021				
5-4-2	Test-Data-Integration	Done	100%	2w	9-Aug-2021	20-Aug-2021				
5-4-3	Establish-Emergency Procedures	Done	100%	2w	23-Aug-2021	3-Sep-2021				
5-5-	Closure	Done	100%	20d	23-Aug-2021	17-Sep-2021				
5-5-1	Create-Annual Maintenance-Plan	Done	100%	2w	23-Aug-2021	3-Sep-2021				
5-5-2	Go-Live-with-Data Integration	Done	100%	4w	23-Aug-2021	17-Sep-2021				

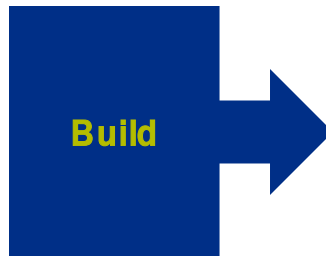
Next...



Building Blocks in a Nutshell



- Use a sample file for a completed application to ensure that all possible data points are included
- Configure remap settings; some data fields are pre-mapped and should not be adjusted, nor should other fields be mapped to these destinations. Take your time, do not rush the process
- Remap in production to perfection and refresh the test environment
- Documents sent from Liaison will NOT be imported into the test environment



- Build tools and processes to load data into local systems
- Test the tools and processes



- Determine who will monitor the loads
- Develop quality control, e.g success or failure messages
- Prepare a backup plan



- Plan for annual cycle
- LAUNCH!

Next...

Technical Tasks



Create subscriptions to deliver files to Slate's SFTP Explorer automatically

```
POST {{baseUrl}}/v1/applicationForms/{{applicationFormId}}/organizations/{{organizationId}}/subscriptions

Params Authorization Headers (11) Body Pre-request Script Tests Settings
none form-data x-www-form-urlencoded raw binary GraphQL JSON

1 [
2   "notificationEmailAddress": "[ENTER A MONITORED EMAIL ADDRESS TO RECEIVE NOTIFICATIONS ABOUT YOUR SUBSCRIPTIONS]",
3   "subscriptionDetails": [
4     {
5       "destinationType": "SFTP",
6       "event": "application.program.received",
7       "responseLevel": "program",
8       "responseType": "fullResponse",
9       "responseOptions": "expand=all,includeNulls=true,content-type=text/csv,columnSeparator=COMMA, csvHeaderTruncationSize=4, csvShortName=question",
10      "apiVersion": "v2",
11      "sftpDestination": {
12        "sftpHost": "ft.technolutions.net",
13        "sftpPort": 22,
14        "sftpUser": "[ENTER SFTP USERNAME HERE]",
15        "sftpPassword": "[ENTER SFTP PASSWORD HERE]",
16        "sftpBaseDirectory": "/incoming/liaison/",
17        "sftpPathTemplate": "[ENTER CAS NAME HERE]_<instanceId>_<organizationId>_<programId>_<applicationId>_<casApplicantId>.csv"
18      }
19    ]
20  }
```

What I wish I Knew Beforehand



- Take your time in your configurations in CAS
- Complete nearly every single question in a completed application
- Remap in production then refresh test...but not before you've perfected the mapping
- Note that you will be creating completely new source formats and you will need to complete the field and value mappings for those (beyond what is pre-mapped) so it's not all sunshine and moonbeams



What I wish I Knew Beforehand (cont.)



- Understand the “unique for merging”
- Use of “field fusions”
- Naming SFTP folders
- For Slate fields don’t use names like “BCAS” or “ENGCAS”
- Documents: Official vs Unofficial is all in the “transcript type”
- Have a backup plan in your CAS



Questions and Answers



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Resources



- Help@Liaison
 - Slate Integration;
https://help.liaisonedu.com/API/CAS_API/Slate_Integration
- Slate Knowledge Base
 - Liaison CAS Applications Integration;
(<https://knowledge.technolutions.com/hc/en-us/articles/360059283232-Liaison-CAS-Applications-Integration>)

Thank You



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