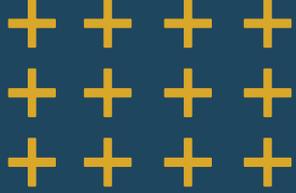


# Sharing is Caring

Especially in Slate

JUNE | 2024





# *Agenda*

- 1 Introductions
- 2 Shared Instances
- 3 Case Study: User Access
- 4 Resources

PRESENTER

# Shelly Blunt

- + Interim Provost, University of Southern Indiana
- + Slate user since 2022
- + Slate Implementation Team Lead
- + The Creative + Analytical Theorist



## PRESENTERS

# Courtney Mumma

- + Assistant Director of Student Success, Carnegie
- + Slate user since 2019; Carnegie since 2022
- + The Confident + Enthusiastic Thrill Seeker



# Justin Pierce

- + Sr Slate Admissions Implementation Strategist, Carnegie
- + Slate user since 2015, Carnegie since 2022
- + The Confident + Energetic Magician



2

# Shared Instances

## Who in this room...

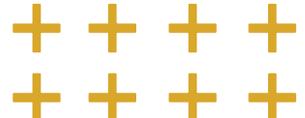
- + Has an admissions instance?
- + Has a student success instance?
- + Is thinking about implementing student success?
- + Has an advancement instance?

# Defining a Shared Instance

**Any combination of 2 or more distinct populations of records in a single instance.  
This commonly entails more than one governing body in the single instance.**

## Examples

- Student Success + Admissions
- Student Success + Advancement
- Admissions + Advancement
- Undergraduate + Graduate Admissions



# *Making the Decision to Share*

# Making the Decision to Share

**What key conversations did your team have before moving forward? What key conversations do you wish your team had? Who was involved?**

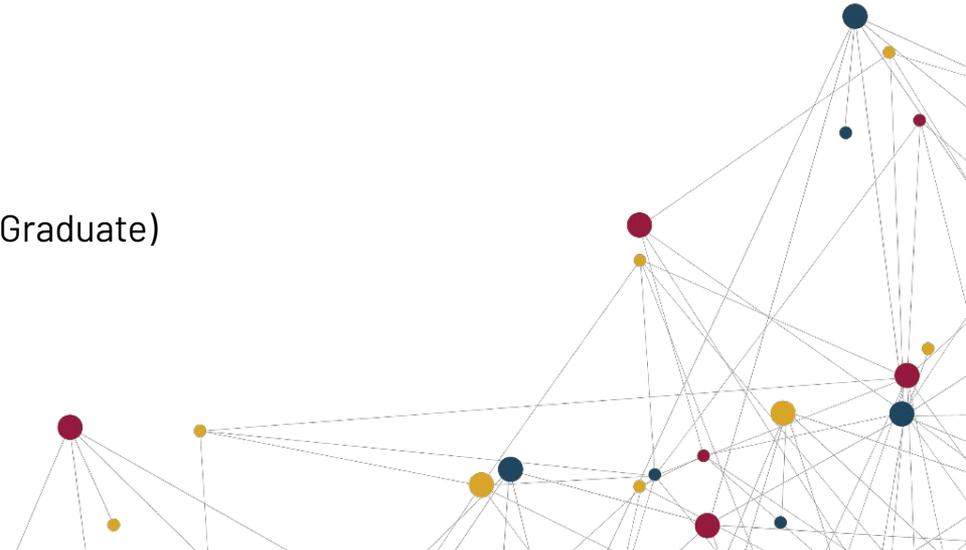
**How did your institution decide to use a shared instance? What were the factors for consideration—financial, operational, resourcing?**



# Making the Decision to Share

**What key conversations did your team have before moving forward? What key conversations do you wish your team had? Who was involved?**

- + Slate vs. other CRM's
- + Selection Committee
  - Alumni & Foundation
  - Adult Learners
  - Faculty
  - Academic Affairs
  - Admissions (Both Undergraduate and Graduate)
  - Student Success/Student Affairs
- + Preferred Partner Selection



# Making the Decision to Share

**How did your institution decide to use a shared instance? What were the factors for consideration (financial, operational, resourcing)?**

- + Easier to split a shared instance than combine separate instances
- + Other institutions around us were not sharing
- + Free to share



# Making the Decision to Share

**Recommendation:** Reference the Knowledge Base article Considerations for Administering Student Success and Admissions in a Shared Database



## Roses

- + Access Customization
- + Cross Team Collaboration
- + Team Decision Making
- + Weekly Team Meetings
- + Team Learning
- + High Fences Make Good Neighbors

## Thorns

- + Coordination/Communication
- + Slow Decision Making Process
- + Lack Of/Too Many Decision Makers
- + Duplicative Builds
- + Difficulty Determining Priorities
- + Potential To Build A Camel  
(Horse Built By Committee)

# *Implementation Process*

# Implementation Process

**What topics/conversations came up during the admissions implementation that surprised you?**

**What came up in the student success implementation that required additional resources than anticipated?**



# Implementation Process

**What topics/conversations came up during the admissions implementation that surprised you?**

- + Pace of implementation and how quickly decisions needed to be made
- + Automation for processing
- + Orientation location - Is it Admissions or Student Success?



# Implementation Process

**What came up in the student success implementation that required additional resources than anticipated?**

- + Integration was more challenging
- + Portals
- + Possibilities are limitless - Prioritization is key



## Implementation: Lessons Learned / Advice



Timeline



Implementation  
Team



Internal  
Meetings/ Work



Special  
Populations

# *Shared Governance*

# Shared Governance

**Who is currently responsible for your shared instance? Is there a governance team separate from the system administrators/Slate captains?**

**Does your governance team look different than the implementation team?  
Looking back, are there staff you wish had been more involved in implementation?**



## Slate Leadership Team

- + Provost
- + VP for Marketing and Communications
- + VP for Enrollment Management
- + VP for Student Affairs
- + Dean of Graduate Studies (GR Admissions)
- + Executive Director of Enrollment (UG Admissions)
- + Executive Director for Student Success (SS)
- + Chief Information Officer (IT)

## Slate Captains/Working Group

- + CRM Manager (IT)
- + Dean of Graduate Studies (GR Admissions)
- + Executive Director of Enrollment (UG Admissions)
- + Executive Director for Student Success (SS - Slate Captain)
- + Assistant Director of Admissions Operations (UG Admissions - Slate Captain)
- + Graduate Marketing and Recruitment Specialist (GR Admissions - Slate Captain)
- + Software Developer
- + Others as determined by the specific uses

# Shared Governance

**Who is currently responsible for your shared instance? Is there a governance team separate from the system administrators/Slate captains?**

Joint responsibility:

- + UG Admissions
- + GR Studies
- + Student Success Team
- + IT

CRM Manager (IT) - neutral territory



# Shared Governance

**Does your governance team look different than the implementation team?  
Looking back, are there staff you wish had been more involved in  
implementation?**

Governance Structure is a subset of Implementation team. Timing of when to involve other team members is an area of improvement. Some were involved too soon and others should have been involved earlier.



3

# Case Study: User Access

## Who in this room...

- + Feels confident in their user access setup?
- + Is using realms?
- + Has concerns about sharing data across users/offices?

## Tools and Definitions

- + User Permissions - What can a user do?
  - EX: Events, Events (Edit all users)
- + Roles - A bundle of permissions for consistent user access
  - Ex: Admissions Counselor
- + Populations - What groups of records can a user access?
  - Ex: Undergraduate Admissions records
- + Realms - What objects can a user access?
  - Ex: Undergraduate Admissions events

The screenshot shows a web browser window with the URL <https://connectus.edu/manage/database/security/?view=role>. The page title is "Edit Role".

**Form Fields:**

- Status: Active (dropdown)
- Name: GR Admissions Assistant
- Export Key: (empty)
- Reply Email: (empty)

**Permissions Table:**

Permissions (System)	Status
<input type="checkbox"/> Active Scheduler Administrator	
<input type="checkbox"/> Application Decide	
<input checked="" type="checkbox"/> Application Decisions (View)	Granted
<input checked="" type="checkbox"/> Application Lookup	Granted
<input type="checkbox"/> Application Lookup (Active Period Only)	
<input checked="" type="checkbox"/> Application Review Forms	Granted
<input checked="" type="checkbox"/> Application Update	Granted
<input checked="" type="checkbox"/> Audit Log	Granted
<input checked="" type="checkbox"/> Batch Acquire	Granted
<input checked="" type="checkbox"/> Bin Management	Granted
<input checked="" type="checkbox"/> Consolidate Records	Granted
<input type="checkbox"/> Custom SQL	
<input type="checkbox"/> Database	
<input checked="" type="checkbox"/> Dataset Lookup	Granted
<input type="checkbox"/> Dataset Update	

**Buttons:** Save, Cancel

**Background List (Left):**

- Name
- [New Role](#)
- Digital and Web Conte
- Faculty
- Financial Aid
- Financial Aid Inbox
- GR Administrator
- GR Admissions Assista
- GR Advisor
- GR Dean
- GR Graduate Assistan
- GR Graduate Assistan
- GR Graduate Program
- GR Graduate Program
- GR Graduate Support
- GR Senior Administrat
- GR Student Affairs Ad
- GR Student Success
- Graduate Studies Inb
- Marketing and Communica

# STACKING ROLES

Title

Email

Primary Phone

Mobile Phone

Status

Current Roles



Active

Student Success, UG Advising Admin, UG Advising Admin (Permissions - Student Success), UG Advisor

Edit User

Impersonate



Logins (last 90 days)



GR Assistant Role



Search... ▶

Mumma TEST, Courtney TEST

Applicant 667891460

- Dashboard
- Timeline
- Profile
- Materials
- UG Details
- Recruitment

Person Dashboard

**Banner ID:**

**Student Level:** -- Undergraduate  
**Student Type:**  
**Recruitment Student Type:** New First Time Freshman  
**Application Student Type:**  
**Academic Program:** Art / Criminal Justice / Biology  
**Staff Assigned:** Kaitlyn Schrank

**Text Opt-In:** No Response

**Personal Pronouns:**  
**Gender Identity:**

**Campus Visit:** No

**Undergraduate Entry Term:** Fall 2024  
**Graduate Entry Term:**

Biographic

New Haven, CT  
 CT-02 New Haven & Middlesex Co



157 Church St  
 New Haven, CT 06510-2100

Connect

Email [cmumma@carnegiehighered.com](mailto:cmumma@carnegiehighered.com)

Tags

Graduate Readmit Opt Out TDCI/STEM

**Test Record**



GR Assistant Role

Search...

Mumma TEST, Courtney TEST

Applicant 667891460

- Dashboard
- Timeline
- Profile
- Materials
- UG Details
- Recruitment

### Person Dashboard

**Banner ID:**

**Student Level:** -- Undergraduate

**Student Type:**

**Recruitment Student Type:** New First Time Freshman

**Application Student Type:**

**Academic Program:** Art / Criminal Justice / Biology

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**Gender Identity:**

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Tags

- Graduate Readmit
- Opt Out
- TDCI/STEM

Test Record



Student Success Admin

Search...

Mumma TEST, Courtney TEST

Applicant 667891460

- Dashboard
- Timeline
- Profile
- Materials
- Registration History
- Student Schedule
- Advising Notes
- Student Success Details
- UG Details
- Recruitment
- GR Plan
- +

## Student Success Dashboard

Banner ID	Program Art	Advisor	
Academic Standing	Confidential Flag Check Banner	USI Email	
Classification	Student Type	GPA	Financial Aid & Scholarship
Attributes	Activity	Holds	Anticipated Graduation

New Haven, CT  
CT-02 New Haven & Middlesex Co



157 Church St  
New Haven, CT 06510-2100

### Connect

Email [cmumma@carnegiehighered.com](mailto:cmumma@carnegiehighered.com)

### Tags

Opt Out: **Test Record** Adult Learner

### Unsubscribes

No unsubscribes for email or mobile devices.

# RECORD VISIBILITY FOR ROLES - Student Success

slate



Student Success Admin

Search...

Mumma TEST, Courtney TEST

Applicant 667891460

- Dashboard
- Timeline
- Profile
- Materials
- Registration History
- Student Schedule
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- Student Success Details
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## Student Success Dashboard

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# RECORD VISIBILITY FOR ROLES - Student Success

slate



Student Success Admin

Search...

Mumma TEST, Courtney TEST

Applicant 667891460

Dashboard | Timeline | Profile | Materials | **Registration History** | Student Schedule | Advising Notes | Student Success Details

UG Details | Recruitment | GR Plan | +

## Student Success Dashboard

Banner ID	Program Art	Advisor	
Academic Standing	Confidential Flag Check Banner	USI Email	
Classification	Student Type	GPA	Financial Aid & Scholarship
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### Tags

Opt Out: **Test Record** Adult Learner

### Unsubscribes

No unsubscribes for email or mobile devices.

# OBJECT VISIBILITY (REALMS) - Student Success - Undergraduate



SS Undergraduate - Realms

Search...

## Events

New Event    New Template

Search Events...

Date	Day	Time	Name	Location	User	#
03/26/...	Tue	10:00 AM	Undergrad Registration Event	Evansville, IN		574 (428)

- Events**
- [Scheduler](#)
- [Active Scheduler](#)
- [Resources](#)
- [Trips](#)
  
- [Calendar](#)
- List View**
- All Events
- Confirmed
- Tentative
- Cancelled/Declined
- Full

# OBJECT VISIBILITY (REALMS) - Student Success - Graduate and Undergraduate



SS Undergraduate + Graduate - Realms

Search... ▶

## Events

**New Event** | New Template

Search Events... ↔

Date	Day	Time	Name	Location	User	#	
09/20/2022	Tue	05:30 PM		Greencastle, IN		1	■
09/21/2022	Wed	09:00 AM		Terre Haute, IN		0	■
09/22/2022	Thu	10:30 AM		Sullivan, IN		0	■
09/26/2022	Mon	05:30 PM		Elkhart, IN		0	■
09/27/2022	Tue	05:30 PM		Kokomo, IN		12 (12)	■
09/28/2022	Wed	08:00 AM		Culver, IN		0	■
09/28/2022	Wed	05:00 PM		Lafayette, IN		0	■
09/29/2022	Thu	09:00 AM		Terre Haute, IN		0	■
08/22/2023	Tue	12:00 PM				1 (1)	■
08/28/2023	Mon	06:00 PM		Indianapolis, IN		3 (2)	■
09/05/2023	Tue	10:00 AM				0	■
09/11/2023	Mon	09:30 AM		Evansville, IN		13	■
09/15/2023	Fri	12:00 PM		Wilkes Barre, PA		2 (2)	■
09/15/2023	Fri	03:00 PM		Wilkes Barre, PA		0	■
09/15/2023	Fri	06:00 PM		Indianapolis, IN		0	■
09/15/2023	Fri	06:00 PM		Wilkes Barre, PA		0	■

### Events

- [Scheduler](#)
- [Active Scheduler](#)
- [Resources](#)
- [Trips](#)

### Calendar

### List View

- All Events**
- [Confirmed](#)
- [Tentative](#)
- [Cancelled/Declined](#)
- [Full](#)

### All Folders

- [2023 Travel](#)
- [2024 Travel](#)
- [Family Weekend](#)
- [Orientation](#)
- [Spring 2024 Travel](#)
- [Student Success Events](#)
- [Templates](#)

# OBJECT VISIBILITY (REALMS) - Student Success - Undergraduate

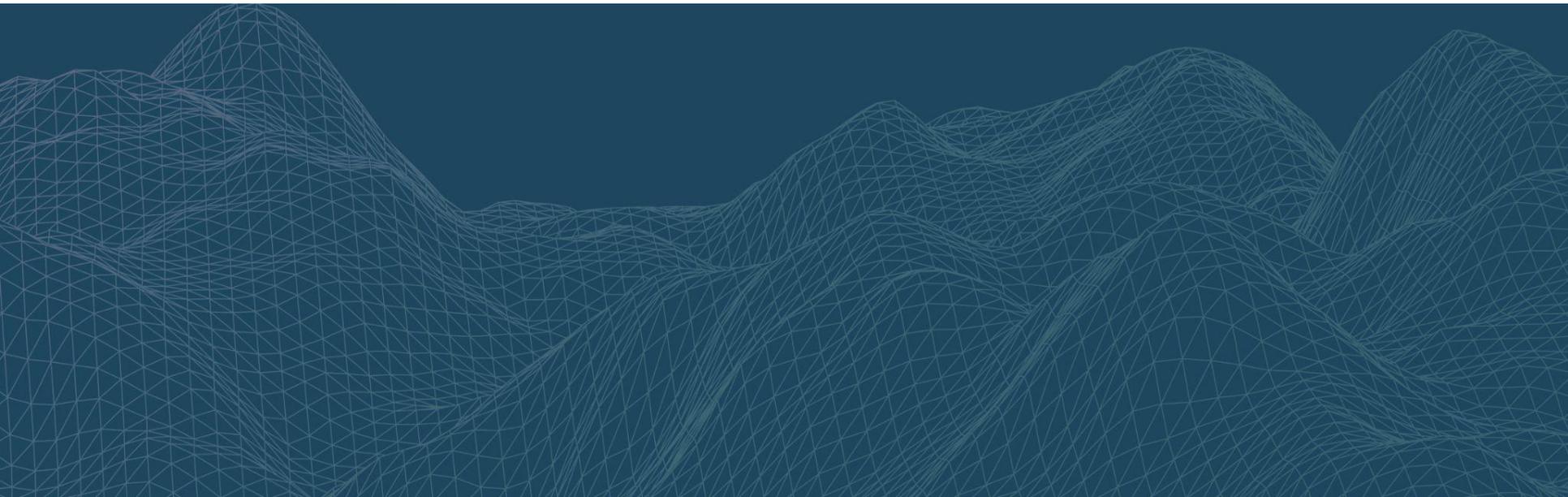
slate         

SS Undergraduate - Realms

Forbidden

Required Permissions: Events

You do not have access to this resource. [Request Access](#)



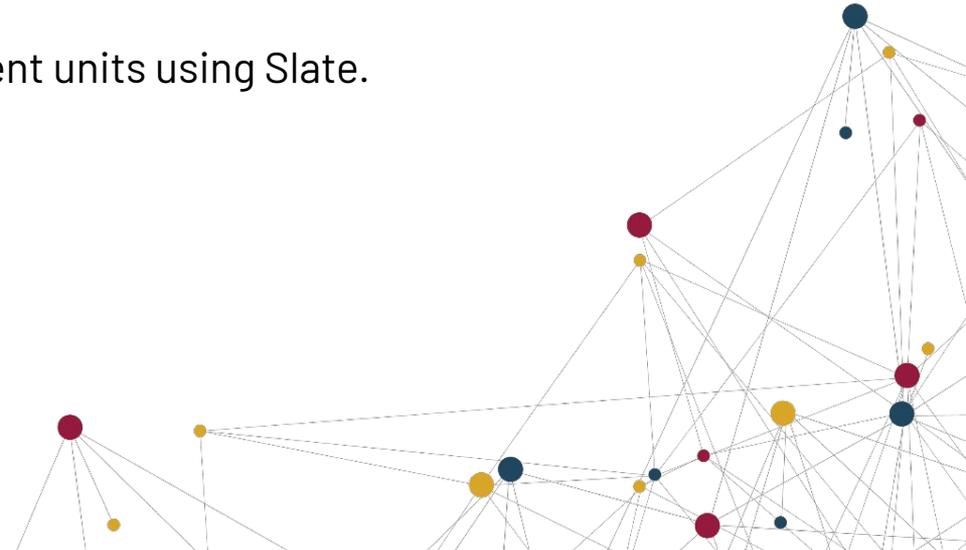
# *Key Takeaways*

## Case Study: User Access

**What discussions brought you to this setup for access? What issues did your team need to work through?**

Educational Right-to-Know guided the access conversation.

Trust needed to be built between the different units using Slate.



# Case Study: User Access

**Who updates access for new and existing users?**

CRM Manager and Slate Captains



# 4 Resources

Who in this room...

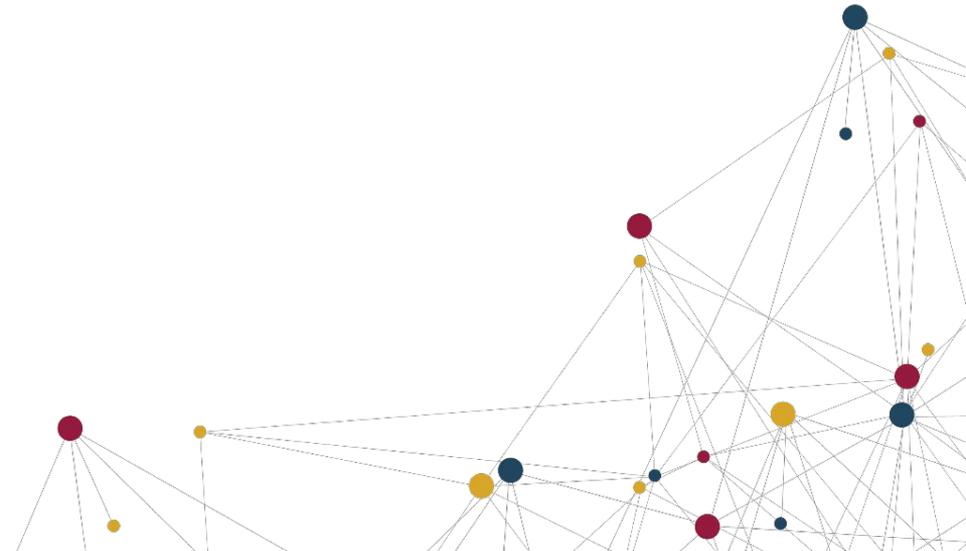
- + Feels ready to implement all the things?

# Resources

Suitcase ID: 96936c32-d426-4a88-b603-063d7b2d33a4:usr

- + A query to show roles, permissions, population, and realm access by user

Carnegie Student Success Example Files





CARNEGIE



# Q+A

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# Thank You!

---

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