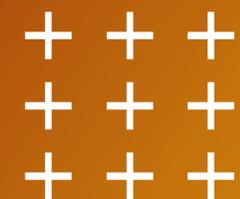




# Consolidate Records

Slate Demo Series



# Presenter



## Nick Porcella

Assistant Director, Slate Trainings

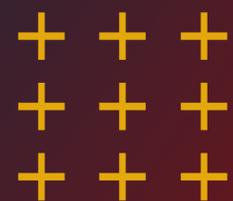
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### Archetype Persona

The Industrious +  
Meticulous Philosopher

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# Agenda



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**1 Overview**

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**2 Slate Demo**

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**3 Summary of Best Practices**

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1

# Overview

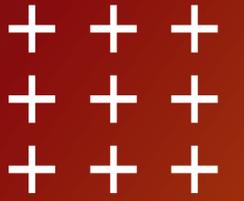
## What is the Consolidate Records module?

- + At its most basic definition, Consolidate Records is Slate's deduping hub.
- + Absolutely critical to use.
- + Some technical information from the Knowledge Base: "Every night in production databases, cleanup scripts run to remove duplicate data, and fix invalid items. The overnight cleanup process is placed into a queue of the overall nightly process, which begins at 2:30 AM Eastern time. Depending on its placement in the queue and other cluster database activity, the cleanup process can run anytime after 2:30 AM Eastern time. Typically everything is concluded by 10:30 AM Eastern time. However, there may be occasions when the process runs later in the afternoon."
- + **Today's demo will provide the most basic foundation.**
- + Let's start with a horror story—one more common than you might realize.



2

# Slate Demo



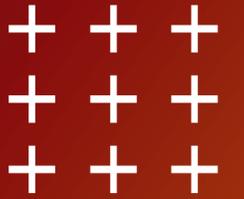
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# Summary of Best Practices

## In the Age of AI...

...there remains a need for some human touch. **Consolidate Records** is a shining example of that.

- + Take the advice from Technolutions: Collect first name + last name + email + birthdate on your forms.
- + Dedicate one or two staff members to review this module **daily**. At a minimum, weekly.
- + Be methodical: Use all available information before merging. Along the same lines, avoid unmerging.
- + Have *a lot* of records to manage? Start now. Chip away at it.
- + Recognize that today's session is about covering the basics/essentials. Go to the Knowledge Base to uncover all the technical aspects, data nuances, and possible considerations for merging.
- + Bonus: If you have the opportunity, consider building a custom dashboard. There is an aptly-named Knowledge Base article to help guide you: "Consolidate Records - Custom Dashboard".



# Thank You!

**Nick Porcella**

[nporcella@carnegiehighered.com](mailto:nporcella@carnegiehighered.com)

**Nick Porcella**

[nporcella@carnegiehighered.com](mailto:nporcella@carnegiehighered.com)

**CARNEGIE**

210 Littleton Road, Suite 100 Westford, MA 01886

978-692-5092 | [info@carnegiehighered.com](mailto:info@carnegiehighered.com)

[carnegiehighered.com](http://carnegiehighered.com)

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