

## INTEGRATE CAS DATA WITH YOUR SYSTEMS OF RECORD

Here are answers to some common questions about how to integrate applicant data collected by a centralized application service (CAS) with the Enterprise Resource Planning (ERP) and Student Information (SIS) systems used on your campuses.

### ***Which ERP systems can import CAS data?***

Most higher education ERP and SIS systems have the ability to import external applicant data via configurable tools native to each system. WebAdMIT is web-based admissions management software that provides real time access to your applicants' data and documents to facilitate the management of your unique admissions processes. WebAdMIT's Export Manager provides simple-to-configure exports of any subset of applicant data an ERP/SIS system needs, filtered by any criteria you choose to apply. These exports are available in several formats to simplify the import process. The most common systems used by our university clients include Ellucian (Banner and Colleague), Oracle (PeopleSoft), and Jenzabar, among others.

### ***Is there one solution for all ERP/SIS system integrations?***

Because there is no standard, pre-packaged solution that can manage school-specific ERP implementations, most schools choose to execute the final import of CAS data into their ERP or SIS system.

Liaison focuses on making the data export from WebAdMIT as seamless as possible by using user- and IT-friendly formats and application program interfaces (API's)—so developing an individualized solution to integrate CAS data with your school's ERP or SIS system should be relatively straightforward.

Institutions that have multiple schools or programs participating in a CAS can leverage expertise gained during the initial configuration of ERP or SIS tools, making subsequent integrations for additional programs hosted within a CAS much simpler.

### ***How do I create On-Demand Exports in WebAdMIT?***

Liaison's WebAdMIT admissions toolkit provides a number of utilities and data formats that can be used to import data into an ERP or SIS system. These tools give institutions the ability to:

- Create files with only the fields required for use in their integration, rather than adapting to an obscure proprietary data format.
- Sequence fields exactly as demanded by the ERP system's tools.
- Apply several commonly used transformations (e.g. date formats) on data to simplify importing.
- Limit the applicants included in the integration by any criteria required.
- Run the export as frequently or infrequently as needed.
- Output the files into numerous formats, such as comma-delimited, fixed-width, and Excel.
- Run and access these exports for download via API.

### ***What are the options when considering how to configure my university's ERP or SIS system's native tools to import applicant data exported from my CAS?***

The institution's IT team can use the data definitions in the Custom Export Layout file provided within WebAdMIT to configure the system's tool to import CAS data. Alternatively, a school can contract with a third-party vendor to handle the data import processes for them, as these generally only need to be configured once (with subsequent light maintenance).

### ***Who do I contact at Liaison for support with CAS data and ERP integration?***

Many schools and programs find the integration of CAS data with their ERP system to be straightforward; others need additional support with implementation. Our team is always here to provide support and guidance. If you have questions or feedback, please contact our WebAdMIT Support Team at [WebAdMITSupport@liaisonedu.com](mailto:WebAdMITSupport@liaisonedu.com).

### ***Does Liaison recommend any third-party vendors for integration support services?***

Our WebAdMIT Support Team has helped many universities in performing data integration between our systems and a variety of ERP or SIS systems, and they are more than happy to work with you and your IT staff. For institutions that would prefer a turnkey solution, Liaison works with SSD Technology Partners/Axiom, who are specialists in performing Banner integrations of CAS data. They also have experience in a few other SIS integrations, including Colleague and PowerCampus. If you are interested in retaining SSD's services, please contact Lisa Detwiler at [ldetwiler@ssdel.com](mailto:ldetwiler@ssdel.com).

### ***What tools are available for exporting application data?***

**WebAdMIT Export Manager:** This tool allows schools to determine which applicants are needed to export (for example, only those whose data has changed in the last 7 days or only those who have a decision of "accepted" - or it could be all applicants).

- Schools will need to indicate which of the data fields you'll want to export in a simple drag and drop interface in order to craft the file format that your SIS or other system requires.
- The Export Manager has an accompanying API which is designed to allow permissioned users to look up, run, and retrieve export files designed in WebAdMIT's Export Manager from a direct back-end API, allowing technically-savvy users of WebAdMIT to automate the retrieval of data from WebAdMIT for integration into other on-campus systems.

**WebAdMIT PDF Manager:** This tool allows for the batch download of PDF documents that are part of an applicant's application (letters, transcripts, and so on) for archival or for import into oncampus document management systems.

- The PDF Manager has an accompanying API which allows the batch download of documents to be automated, including the ability to customize file naming conventions to ease import into on-campus systems.

### ***How does Liaison's API simplify the export process?***

WebAdMIT's API tools provide IT teams with the following capabilities:

- **Export Manager API**— Run, download, and process user-created data exports from the Export Manager programmatically, enabling true automation no longer dependent upon manually running export files.
- **Document Export Manager API**—automate batch downloads and indexing of applicant documents (such as the full application PDF) for university record keeping and integration.

### ***Can Liaison provide examples of integration use-cases?***

Many schools that participate in a CAS integrate WebAdMIT (the back-end admissions management tool) to different on-campus systems.

- Some schools need a final export of accepted students sent to their SIS/ERP system at the end of the application cycle, so they do a single data pull & export simply for archival.
- Others might choose *not to use the WebAdMIT admissions management tool* and instead send the data directly to their own university-wide application review or CRM application. In this case they may need to export the data from WebAdMIT weekly or even daily, and on an automated basis.

### ***What steps need to be taken to define my integration?***

- **First** step in defining your integrations:
  1. Identify **What** data you need - what applicants and what data fields?
  2. Define **Where** you need to send it?
  3. Determine **How** often you need to send it?
- **Second** step is to have your IT staff review this website for information: <https://developer.webadmit.org>, and contact Liaison for help on how to use these tools if needed.
- **Final** step is for your IT staff to map the data to your on-campus systems and perform the imports, as they are the ones who know your systems best and what data is needed.