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Data Model and Tooling Overview [1]

November 2, 2023 by Melanie Jones [2]

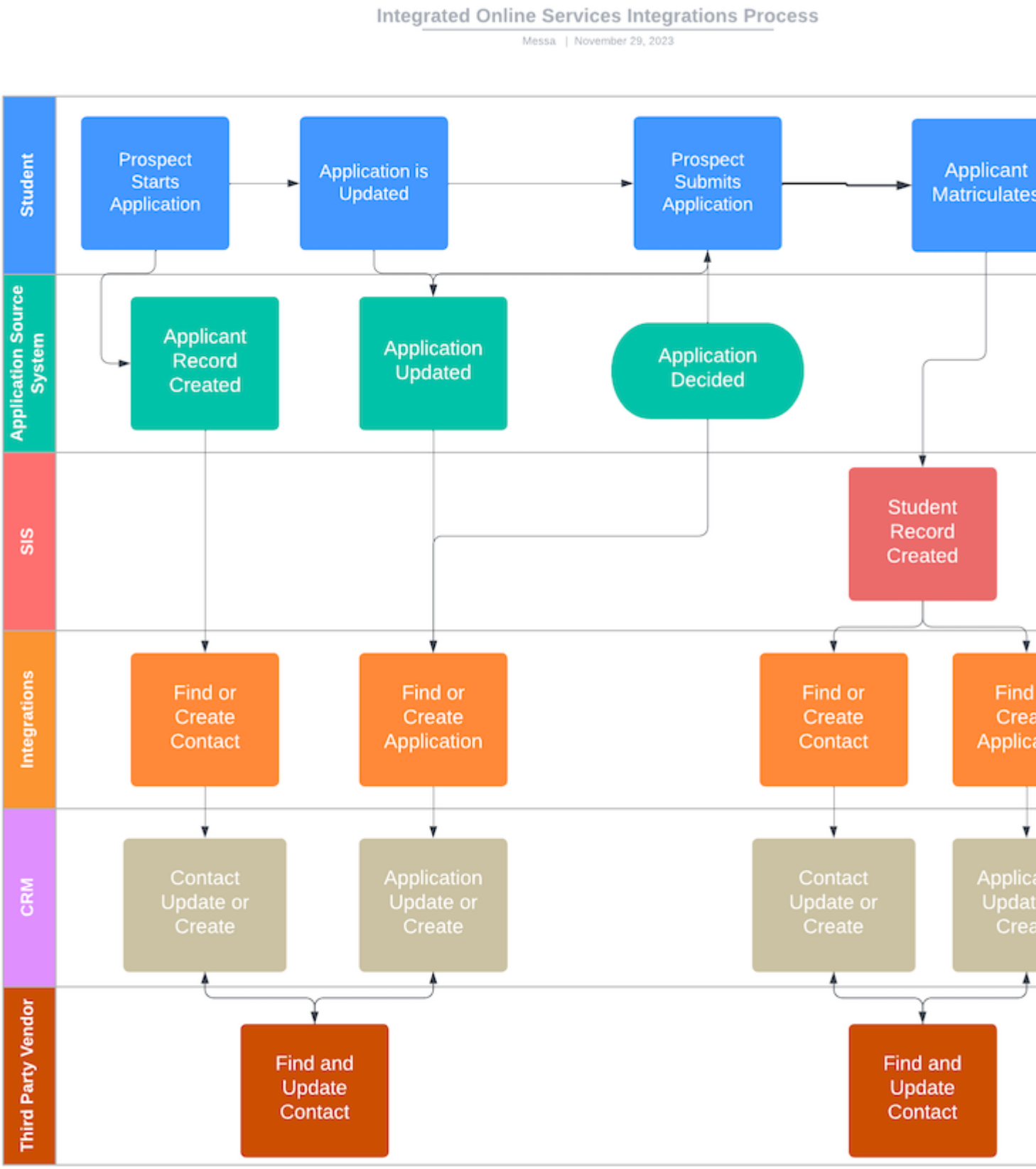
The variety of campus goals necessitates a robust data model that connects multiple applications and systems.

The core data model to support campus efforts follows the Salesforce Education Data Model [3], which allows UIS to fully model the data relationships of CU constituents.

Integrations

UIS has built and supports the following integrations with third-party applications:

- SIS - Application, enrollment and course data
- Slate (Denver) - Campus applications
- Slate (Boulder) - Prospect RFIs and campus applications
- PharmCAS (Anschutz) - Pharmacy applications
- NursingCAS (Anschutz) - Nursing applications
- Collegis - 3rd party call center for lead qualification
- Salesforce Admissions Connect (Colorado Springs) - Campus applications


Integrated Online Services Integrations Process
Messa | November 29, 2023
Student
Application Source System
SIS
Integrations
CRM
Third Party Vendor
Prospect Starts Application
Application is Updated
Prospect Submits Application
Applicant Matriculates
Applicant Record Created
Application Updated
Application Decided
Student Record Created
Find or Create Contact
Find or Create Application
Find or Create Contact
Contact Update or Create
Application Update or Create
Contact Update or Create
Find and Update Contact
Find and Update Contact

[4]

Add-Ons

UIS provides a variety of additional Salesforce tools to assist campuses with marketing and recruitment:

- FormAssembly - Forms
- Drupal - Content management system
- five9 - CTI functionality
- Calendly - Calendars and appointment management
- Mogli SMS - Texting capabilities
- Collegis Education - 3rd party lead qualification call center

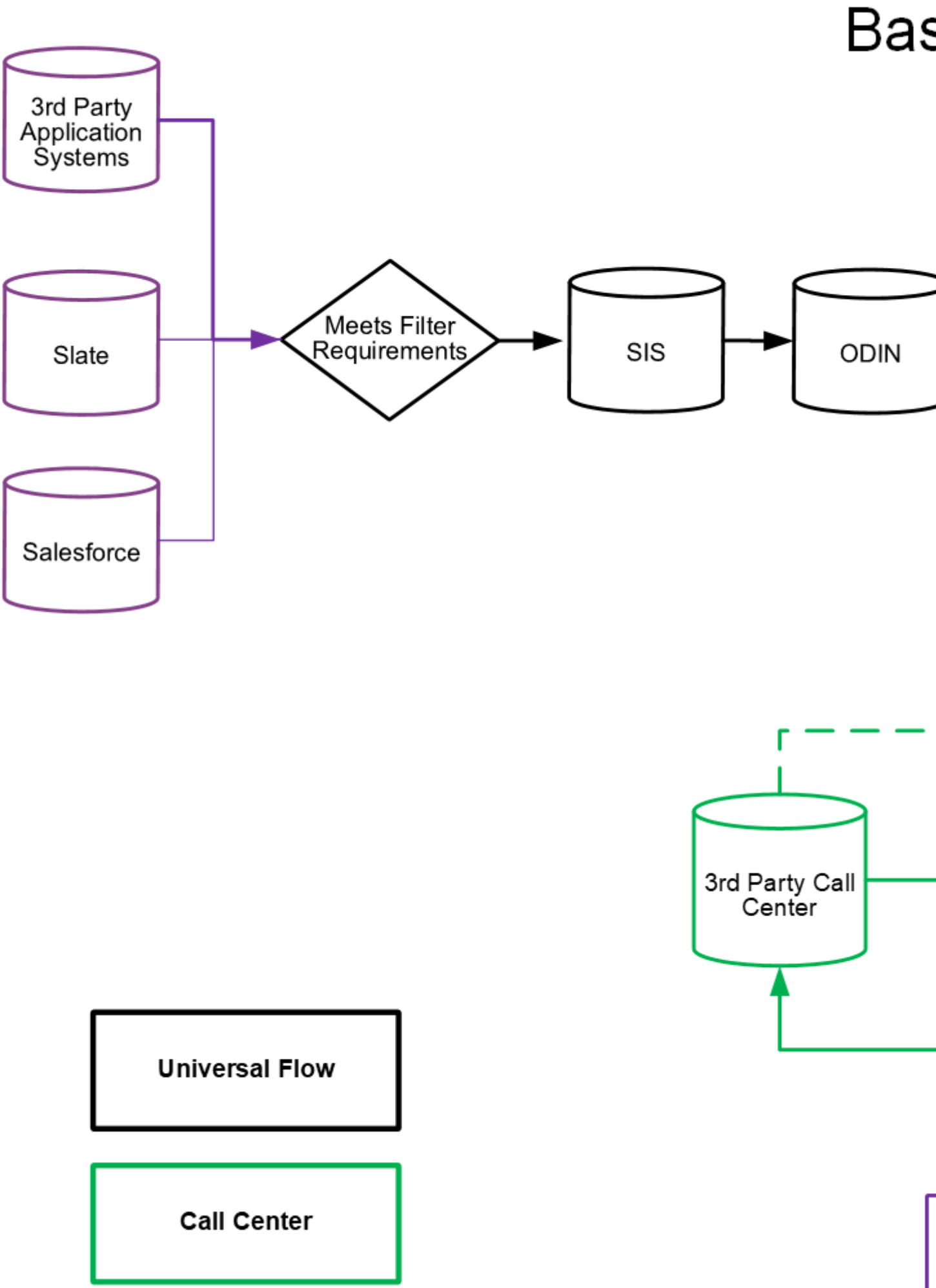
Your specific implementation may only leverage a subset of these applications. Please submit a help ticket [5] if you have further questions.

Data & Flow

Data flows into the IOS Salesforce org through three main buckets.

- **Marketing and Website**
  - All leads from RFI forms, paid and organic advertising
- **Pre-Decision Applications**
  - All in-progress and submitted applications
- **Post-Decision Applications and Enrollments**
  - All Submitted applications with decision information or any active enrollment information.

All information about the lead can be found on the "Contact" object. Any Application and Program Enrollment-related information can be found on the "Application" or "Program Enrollment" objects linked to the Contact.


Bas
3rd Party Application Systems
Slate
Salesforce
Meets Filter Requirements
SIS
ODIN
3rd Party Call Center
Universal Flow
Call Center

Review the d [6]etailed data flow. [6]

To learn more about how data is stored and labeled in our Salesforce, click below.

Learn More [7]

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