

RESPONSE TO REQUEST FOR PROPOSAL

To University of Wisconsin Whitewater

From Technolutions

Lisa Dabkowski
slate-proposals@technolutions.com

January 23, 2020

Ryan Moore
Procurement Director
University of Wisconsin Whitewater
800 West Main Street
Whitewater, WI 53190

Dear Ryan,

We are delighted to respond to your Request for Proposal, and we thank you for including Technolutions in your search. We have addressed your requirements in detail and have provided responses to the questions you have posed, in addition to providing broader details on Technolutions, our Slate information management system, and our approach to higher education technologies.

Technolutions is an efficient, innovative, fast-moving company that has over a decade of experience working with many of the top colleges and universities in the nation, including the majority of schools in the latest U.S. News and World Report Top 10 National Universities ranking. Slate has enjoyed a 100% client retention rate from inception and continues to be the most cutting-edge admissions information management system available.

A Slate implementation will meet your enumerated functional and operational requirements. We have engineered Slate to be highly versatile and customizable, and we work closely with our clients to ensure that our technologies continue to meet their specific and varied needs that enable them to operate most efficiently and successfully. As we will detail in the pricing proposal, all customizations can be performed by either the institution or by Technolutions and are performed at no additional cost.

When you have had the opportunity to review our proposal, we invite you to follow up with us if any additional clarification would be helpful.

Sincerest regards,



Lisa Dabkowski
Director

www.technolutions.com

234 Church Street, 15th Floor / New Haven, CT 06510 / 203-404-4835
1211 SW 5th Avenue, 28th Floor / Portland, OR 97204 / 503-765-7500

Tab 1

State of Wisconsin
 DOA-3261 (R05/2014)
 s.16.75, Wis. Statutes

PROPOSALS MUST BE SEALED & ADDRESSED TO:

AGENCY ADDRESS:

University of Wisconsin Whitewater

REQUEST FOR PROPOSAL
 THIS IS NOT AN ORDER

PROPOSER (Name and Address)

Customer/Constituent Relationship Management(CRM)

Technolutions

234 Church Street, 15th Floor

New Haven, CT 06510

Remove from proposer list for this commodity/service. (Return this page only.)

Proposal envelope must be sealed and plainly marked in lower corner with due date and Request for Proposal # **UN-J-0004**. Late proposals will be rejected. Proposals MUST be date and time stamped by the soliciting purchasing office on or before the date and time that the proposal is due. Proposals dated and time stamped in another office will be rejected. Receipt of a proposal by the mail system does not constitute receipt of a proposal by the purchasing office. Any proposal which is inadvertently opened as a result of not being properly and clearly marked is subject to rejection. Proposals must be submitted separately, i.e., not included with sample packages or other proposals. Proposal openings are public unless otherwise specified. Records will be available for public inspection after issuance of the notice of intent to award or the award of the contract. Proposer should contact the person named below for an appointment to view the proposal record. Proposals shall be firm for acceptance for sixty (60) days from date of proposal opening, unless otherwise noted. The attached terms and conditions apply to any subsequent award.

Proposals MUST be in this office no later than

January 20, 2020

Name (Contact for further information)

Ryan Moore

Phone

262-472-1633

Date

1/23/2020

Quote Price and Delivery FOB

University of Wisconsin Whitewater

Public Opening

No Public Opening

Description

Requesting proposals for the Admissions Office for a Customer/ Constituent Relationship Management (CRM) product for student recruitment and management for the Admissions Office and School of Graduate Studies and Continuing Education based on the specifications listed in this document. The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal

Payment Terms: Net 30 Days

Delivery Time: TBD

We claim minority bidder preference [Wis. Stats. s. 16.75(3m)(b)(3)]. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED Minority Business Enterprises. Bidder must be certified by the Wisconsin Supplier Diversity Program. If you have questions concerning the certification process, contact the Wisconsin Supplier Diversity Program, 6th Floor, 101 E. Wilson Ave., Madison, Wisconsin 53703, (608) 267-9550. **Does Not Apply to Printing Bids.**

We claim disabled veteran owned business bidder preference [Wis. Stats. s. 16.75(3m)(b)(3)]. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED Disabled Veteran Owned Businesses. Bidder must be certified by the Wisconsin Supplier Diversity Program. If you have questions concerning the certification process, contact the Wisconsin Supplier Diversity Program, 6th Floor, 101 E. Wilson St., Madison, Wisconsin 53703, (608) 267-9550. **Does Not Apply to Printing Bids.**

We are a work center certified under Wis. Stats. s. 16.752 employing persons with severe disabilities. Questions concerning the certification process should be addressed to the Work Center Program, State Bureau of Procurement, 6th Floor, 101 E. Wilson St., Madison, Wisconsin 53702, (608) 266-5462.

Wis. Stats. s. 16.754 directs the state to purchase materials which are manufactured to the greatest extent in the United States when all other factors are substantially equal. Materials covered in our bid were manufactured in whole or in substantial part within the United States, or the majority of the component parts thereof were manufactured in whole or in substantial part in the United States. Yes No Unknown

In signing this proposal we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

We will comply with all terms, conditions and specifications required by the state in this Request for Proposal and all terms of our proposal.

Name of Authorized Company Representative (Type or Print)
 Lisa Dabkowski

Title
 Director

Phone
 (203) 404-4835

Fax
 (203) 404-4837

Signature of Above



Date
 1/23/20

Email:
 slate-proposals@technolutions.com

This form can be made available in alternate formats to individuals with disabilities upon request.

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AGENCY ADDRESS:

University of Wisconsin Whitewater

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New Haven, CT 06510

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Proposals MUST be in this office no later than	
January 24, 2020	
Name (Contact for further information)	
Ryan Moore	
Phone	Date
262-472-1633	1/23/2020
Quote Price and Delivery FOB	
University of Wisconsin Whitewater	
<input type="checkbox"/> Public Opening	<input checked="" type="checkbox"/> No Public Opening

Description

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Amendment 1: Cover sheet changed Proposal due Date to January 24,2020.

Changed Bid on RFP date(VendorNet) from January 20, 2020 to January 24, 2020

Add Attachment "H" to RFP document

Payment Terms: Net 30 Days	Delivery Time: TBD
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We will comply with all terms, conditions and specifications required by the state in this Request for Proposal and all terms of our proposal.

Name of Authorized Company Representative (Type or Print) Lisa Dabkowski	Title Director	Phone (203) 404-4835	Fax (203) 404-4837
Signature of Above 	Date 1/23/20	Email: slate-proposals@technolutions.com	

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State of Wisconsin
DOA-3261 (R05/2014)
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Proposals MUST be in this office no later than

February 7, 2020

Name (Contact for further information)

Ryan Moore

Phone

262-472-1633

Date

1/23/2020

Quote Price and Delivery FOB

University of Wisconsin Whitewater

Public Opening

No Public Opening

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Amendment 1:

- Cover sheet changed Proposal Due Date to January 24,2020.
- Changed Bid on RFP date(VendorNet) from January 20, 2020 to January 24, 2020
- Add Attachment "H" to RFP document

Amendment 2:

- Changed Cover sheet, Label and Proposal Due Date to February 7,2020.
- Changed dates in Specific Dates: Written questions from January 17,2020 to January 24,2020, RFP's Due Date from January 24,2020 to February 7,2020, Evaluation of RFP due from January 31,2020 to February 14, 2020, Best and Final Offers Requested from February 7,2020 to February 21, 2020, Evaluation complete from February 14, 2020 to February 28, 2020, Award Notification from February 21, 2020 to March 6, 2020.
- Changed Bid on RFP date(VendorNet) from January 24, 2020 to February7, 2020

Payment Terms: Net 30 Days

Delivery Time: TBD

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Name of Authorized Company Representative (Type or Print)
Lisa Dabkowski

Title
Director

Phone
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Signature of Above



Date
1/23/20

Email:
slate-proposals@technolutions.com

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Tab 2

SECTION #1: GENERAL INFORMATION

Conditions of proposal which include the word “must” or “shall” describe a mandatory requirement. All specifications are defined as mandatory minimum requirements unless otherwise stated. If no proposer is able to comply with a given specification, condition of proposal or provide a specific item/service on the Itemized Proposal List, Purchasing reserves the right to delete that specification, condition of proposal or item without having to complete the proposal process again. **FAILURE- TO MEET A MANDATORY REQUIREMENT SHALL DISQUALIFY YOUR PROPOSAL. This contract proposal document and the awarded proposer’s (Contractor’s) response information shall become the Contract.**

1.1 Background Information

Founded in 1868, the University of Wisconsin-Whitewater is part of the 13-campus University of Wisconsin System. With a fulltime enrollment of more than 13,000 students at our Whitewater and Rock County campuses, we aim to inspire, engage and transform lives. UW-Whitewater offers more than 75 associate, baccalaureate and master’s degree programs in the colleges of Arts and Communication, Business and Economics, Education and Professional Studies, Integrated Studies, and Letters and Sciences.

1.2 Purpose:

The UNIVERSITY OF WISCONSIN WHITEWATER, hereinafter referred to as the “University”, through its Budget, Planning and Analysis/Purchasing Department, hereinafter referred to as “Purchasing”, is requesting proposals for the Admissions Office for a Customer/ Constituent Relationship Management (CRM) product for student recruitment and management for the Admissions Office and School of Graduate Studies and Continuing Education based on the specifications listed in this document. The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal.

1.3 Scope:

See Requirements and Specifications (Section 4) and/or Cost Proposal Form (Attachment H) for the minimum acceptable specifications for items/services desired. The estimated item quantities identified on the Cost Proposal Form are for proposal purposes only. The University does not guarantee to purchase any specific quantity or dollar amount. This contract must not be construed as mandatory upon any University campus, State agency or municipality. The University reserves the right to issue separate proposals when deemed in the best interest of the University.

The University intends to utilize the results of this RFP to award a contract for purchase of a CRM to provide the following services:

- Comprehensive, student lifecycle, relationship management capabilities

The entire admission lifecycle from name purchase (prospect), to recruitment efforts (inquiry), through the entire application and review process (applicants) can be managed within Slate. This includes all communications, events, application build and submission, application review, and decision release. All interactions with students are tracked on the student timeline and are available for queries and reports. Person status and application statuses are easily viewable on the person record, allowing schools to see at a glance where in the process a specific person is.

Slate can be used beyond the initial application process to include the broader student lifecycle. We have organizations using Slate’s robust features and functionality to manage post-enrollment processes, online

portals for students and staff, transfer credit evaluations, student registration, retention, student success, and more. Many organizations continue to use Slate to support current students including student affairs offices, career service centers, and even human resources. Finally, Slate's advancement functionality extends these capabilities even further with relationship management, fundraising, and other specific business process requirements of modern institutional advancement offices. Slate provides nuanced permissions allowing partners to control both what a user can do but also to whom they can do it. Thus each part of the process can be tailored to the appropriate staff as the student moves through their lifecycle.

- Manage communications through multiple mediums

Institutions are looking for a variety of ways to communicate with their constituents, both electronically and print, and they wish to target specific groups. Slate is designed to keep up with the wants and needs of our clients. Slate has very robust communication capabilities. Email communications may be sent as a mass communication, either scheduled, ongoing, or as an individual mailing. Event registration communications, form response communications, reminder communications pertaining to events, and follow-up communications may be customized and automated. Communication channels include print, email, and text message. Additionally social media channels can be linked to post communications through Slate, and portals can display updates to the constituents. Multiple constituents Slate allows organizations to be in contact with students, alumni, parents, and other constituencies. As a comprehensive system, Slate aggregates all of the touch points onto a unified person record. These include event and form registrations, email activity (with the ability to view the content of the sent email in the person record), application data and activity, imported data, and all other related data points. Filtering may be done on any number of criteria, including person type.

- Workflow capabilities to automate business processes

Slate is designed to support multiple applications and workflows. Applications are stored relationally to student records, and a student record may contain any number of applications, including applications for the same term. Applications can be configured to either allow multiple applications from one record, or limit records to only submitting one application in a given term, time period, major, or other criteria. Each application can have its own data, materials, review history, and decisions, so a person may apply and be admitted to one program but not another. Workflow capabilities are highly customizable and automatable, enabling the Slate Reader to be customized to model all various processes of reading, evaluating, and routing applications. Workflows may be used when an application should be viewed and evaluated simultaneously for different processes, such as admission and financial aid review.

To track the workflow of a business process, this may be accomplished using a combination of queries and communications; however, the report builder and other features may be involved depending on the project. The Projects feature allows schools to organize day-to-day administrative workflows as tasks. Tasks can be created automatically or manually, and they can be linked directly to records or tools within Slate. If a user is viewing a record, they will be able to see any incomplete tasks that are associated with that record for projects to which they have access.

- Event management capabilities

Slate has a robust event management system for both on and off-site events. Users may choose which events are public, and event landing pages can be created to display all events or a subset of events online in calendar, list, or map format. Events can use templates to group similar types of events together.

Specific locations are included for the events, and people may register for an event prior to it starting. Registration numbers, waitlists, and deadlines may be set. Lists of registrants are kept based on time of registration, and different data points for a registrant can be customized to display in the registrant list. Communications may be built into the event to acknowledge registration, send reminders before the event, or include a survey following the event. Event registration and participation are tracked within the event, and a source interaction is automatically added to the person record upon registration. Source interactions are updated when a person is marked as having attended or cancelled registration for an event.

Users may collect any information as mapped or unmapped fields on the registration form. Unmapped fields will store data but not be visible on the person record (though they are still accessible via the event registration). If an event registration is the first point of contact, a new person record will be created and a source interaction will automatically be added to the record. Personalized URLs can be used in emails sent from Slate to provide both click tracking as well as to bring constituents to pre-populated forms. Any data already present on the person record will be pre-filled on the form if a person accesses the form via a personalized URL.

Events are managed through folders, and folders may be made public or private for display on event landing pages. Events can be organized and configured from one location using event templates. Changes made at the template level automatically propagate down to individual events using the same template. A related events selector widget may be added to the event registration form to show other events happening at the same time and consolidate event registration for multiple events into a single registration form. All events and event fields are available for reporting purposes. Events associated with a location use Google Maps to display event locations, directions, etc. This data can be referenced in event communications.

Automated communications may be sent upon registration, update, cancellation, x number of hours before the deadline or event, and post-event. Registrants may also be automatically notified when moved from "waitlist" to "registered." Event-related information can be merged into the body of the message to customize the communication. Different follow-up messages may be sent for registrants after an event based on their attendance status. Messages may be sent via email, SMS, phone, and print postcards and letters. A satisfaction survey directly associated with the event may be part of the post-event follow up communication. Survey responses are automatically aggregated and available in a dynamically generated report on the event page. QR codes are event specific codes that can be emailed or texted to registrants prior to an event as a part of an event communication. These codes can be presented at the time of the event to allow for a quick and easy check-in process, using the Slate app.

Slate implements the iCalendar (iCal) standard, and through this widely used format, Slate events can be easily shared with calendaring programs such as Google Calendar, Outlook and Mac Calendar. External iCal feeds can also be added into Slate events and interview calendars. Easily add US holidays, institutional calendars, staff calendars, and more directly into Slate, including any free/busy information.

Attendance summaries are standard in Slate. When a registrant is checked in through the event, the person record is automatically updated with proper attendance status. Reports may be built to include year-over-year data. All event data may be exported in multiple formats, such as Excel, PDF, CSV, or HTML.

Event fees/payments may be collected for events, and the amount can either be static or calculated (such as charging an amount per guest). Technolutions has a payment gateway called Slate Payments, or

schools may use their own payment gateway. Slate Payments allows for payments to be made before the form registration may be submitted. Slate integrates with mainstream payment providers, and registrants can be emailed with more information on how to pay for their registration.

- Direct integration with lead generation and social networking platforms

Slate has integrated successfully with a wide variety of software applications including SIS systems such as Banner, PeopleSoft and Colleague, business intelligence solutions, enterprise content management systems, etc. Data is typically loaded directly into an institution's Slate database after undergoing a series of checks. Slate provides built-in integrations with score data file providers including ACT, AP, GRE, IELTS, SAT, and TOEFL, among others.

Integration with social media systems is supported to the extent allowed by APIs or terms of service for these social networks. For example, content from Facebook can be embedded within a portal, and forms can be embedded on a Facebook page. Links can be provided within Slate to "like" or "follow" pages/people. Social media badges can be embedded on pages and in emails. Slate has an integration with Facebook Messenger and Facebook Custom Audiences.

- Integration with PeopleSoft Campus Solutions

Technolutions works with over 150 institutions that interface bidirectionally between Slate and PeopleSoft. Partner institutions can use file transfer via SFTP or RESTful web services for such integration, providing both batch and real-time data transfer. Most commonly, the data exchange is implemented as a transfer of flat files on a scheduled basis through an SFTP server, where the specifications for the data exchange can be dictated by the institution and where all of the value and code translation (for country codes, major codes, term codes, etc.) happens within Slate. The data points from Slate to PeopleSoft typically include the applicant biographic and demographic data, as well as the key application components that are necessary outside of admissions. A Slate ID is also sent, along with a placeholder for the PeopleSoft ID. A return feed is then provided wherein the Slate ID is sent along with the PeopleSoft ID to which the record was matched or for which a record was created. Subsequent data feeds from Slate into PeopleSoft would then include that identifier for direct matching. Please see Slate Technical Details for detailed information on data integration with SIS.

- Integration with a document management system (i.e. ImageNow)

Slate works with many different document management systems. We recommend that files be sent using the DIP format, wherein a ZIP archive is generated containing PDFs/TIFFs of the documents to be imported along with an index file containing the filename of each document and any associated metadata parameters (an SIS ID and document type, for example). Slate can then extract the documents and index file and import the documents onto the appropriate person records. Slate can also extract metadata from within a filename, so institutions may have files with an SIS ID and document code in the filename and obviate the need for an index file, but usually the DIP approach works best. We recommend encapsulating all of these documents into a ZIP file, since SFTP is more efficient with the transmission of a single file (e.g., a ZIP archive) instead of with the transmission of thousands of individual files. We also prefer PDFs to TIFFs, since a digital PDF of non-scanned data would be a fraction of the size of a TIFF, and a TIFF is a rasterized/bitmapped image that won't contain any digital text content and thus cannot be enlarged beyond the original resolution without a loss of fidelity. The most popular document management systems that institutions are using include OnBase, ImageNow, Docfinity, and BDMS.

- Ability to integrate the application into other areas of the University:
 - Student Support & Enrollment Services
 - Alumni Relations & Donor Development
 - Camps & Conferences
 - Other – based on future needs

Slate can be used beyond the initial application process to include the broader student lifecycle. We have partners using Slate's robust features and functionality to manage post enrollment processes, online portals for students and staff, transfer credit evaluations, student registration, retention, student success, and more. Many partners continue to use Slate to support current students including student affairs office, career service centers, and even human resources.

The University reserves the right to negotiate with any contracted vendor(s) to establish additional discounts and/or lower prices for products determined to meet the requirements of a University-led initiative to set product standards. Contractor vendor(s) may be asked to provide new, lower prices for these standard products and configurations for a limited, fixed term, to fall within the term of the contract resulting from this Request for Bid/Request for Proposal.

All UNIVERSITY OF WISCONSIN WHITEWATER departments must be eligible to purchase from this contract

SECTION #4: REQUIREMENTS AND SPECIFICATIONS

NOTE: Failure to respond to all items in this section may be deemed as sufficient reason to reject any proposal. Please format your response to correspond numerically with items listed below.

4.1 Mandatory Requirements

The following requirements in sections 4.1 – 4.4 are mandatory and the proposer must satisfy them. Proposer is to identify each item and sub points below, restate the question and explain/justify if the requirement is met in narrative form.

4.1.1 Experience

The ideal proposer should currently operate constituent relationship management implementations at a minimum of five higher education institutions. The proposer should currently own the specified business and have owned and operated the specific business continuously for a minimum of three years.

Describe the Proposer's experience and capabilities in providing similar services to those required and meeting the requirements of this proposal. Be specific and identify projects, dates, project cost and results. Provide historical background and capabilities of proposer's company with special emphasis on customer / constituent relationship management solutions at universities of comparable size and complexity.

Founded in 1994, Technolutions has served the education industry for more than two decades. In 2000, Technolutions introduced Slate, its flagship information management system. Over the past decade, Slate has been adopted by hundreds of colleges and universities and continues to grow quickly.

Technolutions is trusted by the world's top colleges and universities, including:

- *46 of top 50 U.S. News & World Report National Universities Rankings*
- *46 of top 50 U.S. News & World Report National Liberal Arts Colleges Rankings*
- *The majority of top 25 Businessweek business schools*
- *More than 1,100 top colleges and universities across 3 continents*

Since inception, Technolutions has grown organically, without taking on any third-party investors or venture capital funding. Its founder, Alexander Clark, remains its Chief Executive Officer and sole shareholder, with no plans to become acquired by another business entity. Technolutions achieved profitability within its first year, and its sound business model has enabled its self-funded growth. As a tightly controlled private company, there are no external influences that might prompt a change in ownership or structure. Technolutions has a rich history of being first-to-market with innovative, transformative new features that keep our clients on the cutting edge. We continue to pioneer new technologies on an ongoing basis. The product roadmap typically extends 6 months, as that is the time frame within which new functionality goes from suggestion to implementation. Technolutions has maintained 100% client retention, without exception.

We currently work with more than 1,100 partner institutions. Clients include top research universities, small liberal arts colleges, professional schools, scholarship foundations, high schools, and not-for-profit organizations. The personalized attention we provide to our partner institutions is unmatched. We listen to our partner institutions and strive to keep Slate a premier product by paying attention to our partner institutions' needs and desires.

4.1.2 Financial stability

The proposer must be financially stable as determined by the University. The information below comprising the financial capacity report will be used to determine the financial stability and capability of the prospective vendor. University of Wisconsin-Whitewater (UWW) reserves the right to request further information from proposers to make such determination.

- Sources of financing (shareholders, venture capital, etc.)
- Bank reference(s) and name of auditing firm
- Last two annual reports and all quarterly reports since the last annual report
- Identification of the Parent Corporation and any subsidiaries

Confidential corporate information available upon request.

4.2 Company Overview

The following requirements in section 4.2, proposer is to identify each item and sub points below, restate the question and answer the question in narrative form.

4.2.1 Characteristics

Identify and describe the following characteristics of proposer's firm.

- Legal form of business organization
- State of incorporation including all parent and subsidiaries relationships
- Company history
- Dun and Bradstreet identification number
- Type of business or markets the organization is focused on

- Company product portfolio
- Number of employees
- Organization chart of the firm

Technolutions is an S Corporation.

The company was founded in 1994, and re-incorporated as a Delaware corporation in 2004. Its founder, Alexander Clark, remains its Chief Executive Officer and sole shareholder, with no plans to become acquired by another business entity.

Founded in 1994, Technolutions has served the education industry for more than two decades. In 2000, Technolutions introduced Slate, its flagship information management system, at Yale University. Over the past decade, Slate has been adopted by hundreds of colleges and universities and continues to grow quickly.

Technolutions' Dun and Bradstreet identification number is 797071946.

The tools in Slate were designed and developed to serve the unique process requirements of admissions, advising, and advancement offices. Clients include top research universities, small liberal arts colleges, professional schools, scholarship foundations, high schools, and not-for-profit organizations.

Slate is a comprehensive, completely integrated solution that includes individual and mass email, automatic responses to forms and events, event management for on and off-site events, travel management, reporting, gift management, application submission and management, application reading, and portals. All public facing pages include the organization's branding. Slate is completely mobile friendly. Slate utilizes responsive designs throughout all administrative and end-user interfaces, providing a complete experience across all devices and platforms. The Slate subscription includes all design, development, and implementation services to provide you with the tools as well as skills necessary to achieve your milestones and overall goals. Quite simply, there is no other solution that offers the depth and breadth of Slate. Please see attached white paper for additional details.

Technolutions currently has more than 50 employees.

Additional confidential corporate information is available upon request.

4.2.2 Subcontractors

Explain if proposer's service providers are employees of the firm or are hired as subcontractors. If any subcontractors are included in proposer's response to RFP, the proposer must clearly explain their participation. (University will hold the contractor responsible for subcontractor's performance and work quality should any subcontractors be used on the contract.) This includes any subcontracted web hosting.

There are no third-party vendors or subcontractors required as part of the solution. The service providers are the employees of Technolutions. Technolutions provides all hosting, network, and server management for Slate in secure, modern datacenters, through the use of the Amazon Web Services AWS cloud.

4.3 Vendor Information

Complete and return Vendor Information Form, **Attachment C**.

Please see included Attachment C.

4.4 References

Submit Form DOA-3478 (**Attachment D**) with no fewer than three (3) references from higher education institutions of comparable size and complexity of UWW, to which the proposer has provided services similar in scope within the past three (3) years. Each reference is to include a contact person capable of answering technical questions and providing other relevant information. References may be contacted to confirm the Proposer's abilities and qualifications as stated in Proposer's response. The University may deem the Proposer's response unacceptable if a reference cannot be contacted after reasonable attempts. Please be certain to provide current contact information for your references.

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4.5 Information Technology Requirements (200 points)

4.5.1 General

- Is the solution you are proposing a Commercial-Off-The-Shelf product? Yes _____ No _____

4.5.1.1 Deployment:

- 4.5.1.1.1** Please describe what campus resources will be required to deploy this product. Include IT personnel, subject matter experts, facilities, trades workers, etc. in this discussion.
- 4.5.1.1.2** Describe if any additional suppliers and product are typically needed to complete implementation.
- 4.5.1.1.3** Please describe in the Cost Proposal Form (attachment H) the additional costs to implement that are not reflected in the solution's total price.
- 4.5.1.1.4** Describe a typical implementation timeline for a comparable sized college.

We recommend that partners have two to three Slate Captains who lead the implementation. These Captains are usually experienced officers, counselors, or operational staff who have a solid understanding of your current processes. Captains should have good project management skills and be able to articulate your business process goals and objectives. They should be creative and willing to re-imagine business needs. Additionally, Captains should be able to commit adequate time to focus on your Slate instance to do the necessary build-out and local staff training along the way. They should be empowered to make decisions about implementing Slate without relying upon outside support.

The tools in Slate were designed and developed to serve the unique process requirements of admissions, advising, and advancement offices. Slate is typically able to be implemented and managed entirely within those offices, with the exception of the institutional side of any data integrations to on-campus systems. These data integrations do typically require direct IT support and are described in our Getting Started guide and data integration documentation. SQL skills can be helpful with regards to data integrations, while a comprehensive understanding of the business processes and objectives, coupled with a strong comfort with technology and logical systems, is important for those in the Slate Captains role.

The implementation and training begins with Slate Launchpad, a four-day, in-person comprehensive training course offered in New Haven, CT and Portland, OR. Taught by a team of specialized, highly experienced Program Managers, Technolutions provides robust training and strategizing on an accelerated schedule. By the end of Launchpad, Slate Captains will have the skills necessary to strategize, configure, and customize business processes in Slate. Additionally, Captains will learn about Slate's numerous help resources and establish useful connections with other Slate institutions and the Technolutions staff. Post Launchpad, an institution will have unlimited access to a suite of online training

videos and comprehensive written documentation that mirrors the Launchpad curriculum. If needed, an institution may also request any number of follow-up focused calls with Technolutions experts to discuss any aspect of their business process.

Estimating the amount of time and dedication needed to commit to Slate is a difficult question to answer due to the high degree of variability. The timeline for each institution will depend on the amount of customization required and the time Slate Captains allocate to working on Slate. Institutions should expect that approximately 1/3 of the Captains' time during initial phases should be spent on Slate. Most outreach efforts can 'go live' in about 8-12 weeks.

The included Roadmap is designed to assist the Captains in customizing Slate to meet the institution's needs. We believe that the out-of-box functionality will address most of the requirements. Slate provides many ways to extend the native capabilities of the software, including custom reports, triggers, web services, and portals. All areas of Slate may be customized to meet institutional needs, including (but not limited to) permissions, fields, tabs, reports, events, table views, portals, and the custom-built Slate application. If the project timeframe permits, the preferred strategy is to have the Slate Captains focus their efforts on at least one Roadmap box per week. Some boxes will require more time and some will require less. In general, this is a reasonable pace to expect. One final thought is that Slate is somewhat unique from other systems. There is not a 'live' date necessarily. Many of the things in Slate can be rolled out when ready. For example, Slate can be used for creating inquiry forms and events, even if the custom application is not complete. The application can be built before the reading process is worked on. It is possible and preferable to start with the core functionality needed from Slate, and then refine it in the future.

University of Wisconsin - Whitewater will be assigned a Program Manager who has a complete and general understanding of the entire Slate suite and how each module is interconnected. Each Program Manager also specializes in one or more of the Slate modules. Teams of specialists provide support for specific modules or functionality. In addition to the Slate specialists and cohesive teams, we provide a number of robust resources for every stage of your process. Many of our staff have had previous experience in enrollment management, advancement, and student success roles on campuses across the United States. Our staff also brings a mixed background of expertise in technology, marketing, finance, and management, building upon the skills necessary to ensure success for our partners.

- 4.5.1.2 Network: UWW's network infrastructure runs primarily on Cisco hardware. Please note any special network requirements for the product. For example, will we need to reserve IP addresses, make sure data is available for any peripherals, allow traffic through firewalls to reach off campus systems, wi-fi concerns, etc.

Slate is licensed as a complete package and is entirely cloud based, so there are no hardware or software requirements. Slate supports all modern browsers and platforms, including mobile platforms, and continues to stay current with browser versions as they are released.

No add-ins, plug-ins, Active X controls, or end-user software installation is required, except where direct integration with desktop hardware is required. For example, integration with Microsoft Outlook requires the installation of an Outlook add-in and scanning from a TWAIN scanner directly into Slate requires the installation of a client application that supports all major browsers on the Windows platform. We make

extensive use of modern web and server technologies to forego the requirement that Flash or Adobe Acrobat/Reader be installed.

Please see Slate Technical Details for more information.

- 4.5.1.3 Identity Management: Please describe how the system integrates with other systems for authentication and identity management. UWW currently manages authentication through a SAML based authentication system (ADFS), are these supported? What other options exist, such as with Shibboleth?

Yes. Slate supports nearly all industry standard Single Sign-On (SSO) mechanisms employed in higher-education today, including SAML (Shibboleth/AD FS), CAS, and LDAP/Active Directory. Technolutions is a member of InCommon. Slate supports multifactor authentication.

- 4.5.1.4 Information Security: Provide documentation regarding how the system protects data. Include any information regarding what standards are supported (PCI, HIPAA, etc.).

We use a range of security mechanisms to prevent unauthorized access including multiple layers of firewalls, a web application firewall, intrusion detection systems, honeypots, file integrity monitoring, extensive network segmentation, anti-virus/anti-malware software, and extensive logging with real time alerts for key events. Signatures are updated daily, with anti-virus/anti-malware scans performed immediately afterwards. Our web application firewall blocks known bad actors, as well as malicious behavior. All data is encrypted at rest and in transit. Slate undergoes regular vulnerability and penetration tests by third-party security firms. Please see the attached Slate Technical Details for more information. Slate is compliant with PCI DSS. A third-party security firm undertakes an on-site evaluation and produces an AOC report on our security practices for PCI DSS compliance each year.

- 4.5.1.5 Service Level Agreement (SLA): Provide a copy of a typical SLA the company would have with a customer. Include details about the availability of technical support for UWW IT staff

Please see the existing service agreement in place between Technolutions and University of Wisconsin - Whitewater Graduate Business Program.

- 4.5.1.6 PCI: If PCI is in scope for this deployment does the software integrate with 3rd tier processors such as Cash Net? What would UWW's responsibility be from a compliance perspective if deploying the software?

Slate allows the charging and collecting of fees such as application fees, enrollment deposits, or event payments. Payment transactions are stored in our system as activities that are attached to a record; as such they can be customized to represent any type of transaction. Payments that are due are represented as an activity attached to a record. These payment due activities can be added manually or by automated rules. The records that have amounts due or overdue can be queried, and automated

emails to these users can be sent. The system supports automated emails that can be based on the presence of payment due activities. Partial payments are allowed if supported by a given external payment provider; the built-in Slate payments provider supports partial payments if selected. All payment transactions are handed off to third-party payment providers, and no account details are stored in our system. Discounts are stored in our system as payment waived activities attached to a record, which offset some or all of a payment due activity. They can be added manually or by automated rules; the rules can involve checking for values entered by users, such as codes. Slate maintains compliance with all laws and standards, including PCI compliance for all financial transactions. We currently integrate with the following payment gateways: Authorize.Net, CASHNet, CyberSource, DiamondMind, Flywire, Higher One Netpay, Moneris, Nelnet Commerce Manager, Nelnet Quikpay, Official Payments/ACI, PayEezy, Payflow Link, Payflow Pro, TMS Link, TouchNet Ready and Virtual Merchant/Elavon/Converge. For these external providers, reporting and reconciliation will be done from those systems, and refunds will happen within the external systems. Slate Payments is a payment gateway that is built into Slate. Behind the scenes, Slate payments processes transactions using a platform called Stripe.com. Stripe.com is level-1 PCI compliant (<https://stripe.com/docs/security/stripe>). If using Slate Payments, reporting and reconciliation can be done from Slate using our query builder, and refunds will be initiated directly in Slate.

4.5.1.7 Training: Describe what ongoing training or resources are available and what audience they are designed for.

Slate Launchpad is a four-day, in-person program which begins your implementation and is taught by a team of highly experienced Program Managers who provide Slate training on an accelerated schedule. By the end of Launchpad, University of Wisconsin - Whitewater's Slate Captains will have the skills necessary to strategize, configure, and customize your business processes in Slate. Additionally, your Captains will learn about Slate's numerous help resources and establish useful connections with other Slate institutions and the Technolutions staff. Post Launchpad, an organization will have unlimited access to a suite of online training videos and comprehensive written documentation that mirrors the Launchpad curriculum. If needed, an organization may also request any number of follow-up focused calls with Technolutions experts to discuss any aspect of their processes. The cost of all training, course materials, breakfasts, and lunches are included as part of your Slate license for up to three Captains. An institution is only responsible for travel and lodging expenses for the three Slate Captains attending the Launchpad program. Slate Launchpad 200 is a series of advanced two-day training courses focused on select topics, use cases, and staff roles. Building on the fundamental skills taught at Slate Launchpad, Launchpad 200 will provide intermediate to advanced users the opportunity to learn and grow their Slate abilities with a team of Technolutions staff. Base Camp is a half day pre-conference training option offered annually prior to the start of the Slate Innovation Summit. This pre-conference training offers training for beginners through advanced users. Courses are taught by teams of Technolutions staff focusing on Slate tools and best practices. Technolutions offers organizations a myriad of self-service Slate support resources. In addition to our four-day Slate Launchpad, Launchpad 200, and Base Camp options, illustrated documentation introduces the Slate tools and outlines the step-by-step instructions for building and customizing Slate processes. Additionally, articles are regularly posted online detailing some of the more technical aspects of Slate. All resources are displayed within Knowledge Base, a context-sensitive tool that shows help resources based on the Slate tool the user is accessing at that time. Institutions may request any number of focused calls with Technolutions experts to further discuss and strategize any aspect of their business processes. In the Slate Community Forums, users may ask questions, share best practices, and solicit answers for best practices and advice from the broader Slate community. Slate is in a constant state of evolution with continuous enhancements to Slate published throughout the year. Our feedback portal allows for bidirectional communication about Slate features and functionality. The

development roadmap is shared transparently with all Slate users who can quickly and easily provide feedback about all aspects of the Slate user experience. Finally, Technolutions hosts the Slate Innovation Summit, an annual user conference for all users, including operations, technical staff, counselors, directors, and vice presidents. The Slate Innovation Summit offers numerous sessions covering best and emerging practices within Slate, admissions, advancement, and higher education.

- 4.5.1.8 Software Updates: Describe the process for obtaining and implementing an update to the software. Include all systems that may be impacted by an update (server, client, etc.). How often are updates released or deployed?

Technolutions provides all hosting, network, and server management for Slate in secure, modern datacenters, through the use of the Amazon Web Services AWS cloud.

As with all areas of Slate, we strive to stay ahead of the game and to meet the wants and needs of our partner organizations. New features and functionality are released on an extremely frequent basis. Technolutions has a rich history of being first-to-market with innovative, transformative new features that keep our clients on the cutting edge. We continue to pioneer new technologies on an ongoing basis. The product roadmap typically does not extend past 6 months, as that is usually the time frame within which most new functionality is developed. All changes work their way through a production pipeline, consisting of a series of automated tests that occur as soon as new code is checked in. These range from a simple build of the application, followed by tests of increasing scale, starting with unit tests and working their way through a series of integration tests. Technolutions uses a process of "continuous delivery" where small incremental changes are frequently pushed to production so clients can start enjoying their benefits as soon as possible. All changes are rigorously tested as they make their way through our production pipeline. We do not believe in a "big bang" approach to software, where large disruptive changes are placed in production only once a year, for example. Not only does this delay enhancements, but it can actually increase error rates, as development teams have to focus on multiple issues at once. Over the past 5 years, Slate has achieved 99.999% availability. In order to achieve a high level of uptime, we have a very high level of redundancy within our infrastructure from the disks to the servers to the network. New infrastructure is introduced to this environment after a rigorous period of formal testing and in such a way as to not introduce a single point of failure. All organizations run the current version of Slate. New documentation will be available through the Forums and within Slate. Support for all aspects of Slate is always available. Along with training and documentation, there are also online training videos for on-demand training and in-depth articles. Typically, operating system updates occur on a weekly basis, with critical security patches usually applied the day they become available from the vendor. There are no additional costs for patches, updates or releases. All systems are patched as the fixes become available from the vendor. Error logs are closely monitored for the first several hours following an update to ensure that there are no lingering or introduced issues.

- 4.5.1.9 Describe the installation and setup of your software product. If more than one option exists please provide detail on all options.

Slate is licensed as a complete package and is entirely cloud based, so there are no hardware or software requirements. Slate supports all modern browsers and platforms, including mobile platforms, and continues to stay current with browser versions as they are released.

No add-ins, plug-ins, Active X controls, or end-user software installation is required, except where direct integration with desktop hardware is required. For example, integration with Microsoft Outlook requires

the installation of an Outlook add-in and scanning from a TWAIN scanner directly into Slate requires the installation of a client application that supports all major browsers on the Windows platform. We make extensive use of modern web and server technologies to forego the requirement that Flash or Adobe Acrobat/Reader be installed.

- 4.5.1.10 Please describe any interfaces, APIs, or integration you do with other systems. What is the process for adding new features to your software?

Slate has integrated successfully with a wide variety of software applications including SIS systems such as Banner, PeopleSoft and Colleague, business intelligence solutions, enterprise content management systems, etc. Data is typically loaded directly into an institution's Slate database after undergoing a series of checks. Data can be imported into Slate via the Upload Dataset tool within Slate or via SFTP batch upload. Data may be imported from many sources (e.g., PeopleSoft). Slate provides many demographic and related fields out of the box. Other custom fields may be added as needed. Any number of data points may be imported into Slate. Institutions may choose which fields will be visible on the student record. Data can be exported using SFTP, RESTful web services, and direct SQL access. All data points within a client's Slate instance can be exported. Most institutions will export data to their SIS via flat files on a scheduled basis. Queries are created using Slate's intuitive query builder. From this tool, scheduling an export of data in the desired format is a straightforward process, using flat files or web services. Technolutions specialists can help with more complex queries through Service Desk at no additional charge. Please see Slate Technical Details for more information.

Technolutions has a rich history of being first-to-market with innovative, transformative new features that keep our clients on the cutting edge. We continue to pioneer new technologies on an ongoing basis. The product roadmap typically does not extend past 6 months, as that is usually the time frame within which most new functionality is developed. All changes work their way through a production pipeline, consisting of a series of automated tests that occur as soon as new code is checked in. These range from a simple build of the application, followed by tests of increasing scale, starting with unit tests and working their way through a series of integration tests. Technolutions uses a process of "continuous delivery" where small incremental changes are frequently pushed to production so clients can start enjoying their benefits as soon as possible. All changes are rigorously tested as they make their way through our production pipeline. We do not believe in a "big bang" approach to software, where large disruptive changes are placed in production only once a year, for example. Not only does this delay enhancements, but it can actually increase error rates, as development teams have to focus on multiple issues at once.

- 4.5.1.11 Does software allow for granular system permissions based on user role? If so, please explain.

User access can be customized to allow read-only, update, or no-access to specific types of records, record attributes, components, or functions. Security roles are fully customizable. Slate provides feature-level, function-level, field-level, object-level, and population-level security, enabling granular control of access permissions and rights. An institution can create any number of custom permissions and roles, each of which may contain any number of standard or custom permissions. A user may be assigned to any number of roles and will assume the security permissions from each. Feature-level and function-level permissions define what can be done. Field-level, object-level, and population-level permissions define with what those feature and function level permissions can be used. These population permissions allow segmentation across any number of attributes, including school, degree, program, or any combination thereof, along with any combination of other attributes.

- 4.5.1.12 Describe your typical downtime, how long is your downtime and maintenance schedules

We use a series of rolling updates across our server farm for maintenance and product updates, with no downtime required. Please see Slate Technical Details.

- 4.5.1.13 Describe your product support provided and costs associated with it.

Slate support is available during business hours starting at 8:00am Eastern time and ending at 8:00pm Eastern time. Any number of service requests can be submitted through the Service Desk system at any time. Each request may be set with a severity level as well as ranked so more pressing requests are resolved ahead of other requests. Most Service Desk requests are resolved within the first 24 hours; however, more complex requests may take longer to fulfill. Emergency requests are given 24x7x365 support. Issues of a critical nature are automatically routed to Technolutions senior management to facilitate rapid resolution. Technolutions also offers an emergency paging service that may be called in the event of an outage. There are no plans to change hours of operation.

4.5.2 Vendor Hosted

- 4.5.2.1 Data Center: Describe the facilities that the application is hosted from including. Please specify if the vendor owns the hosting facilities or if hosting is contracted to a third party.

Technolutions provides all hosting, network, and server management for Slate in secure, modern data centers, through the use of the Amazon Web Services AWS cloud.

- 4.5.2.2 Disaster Recovery: Please describe the disaster mitigation and disaster recovery processes. Include information about how long the system would be unavailable and how much data could be lost in a disaster recovery situation.

Production services are hosted in the us-east-1 region in Northern Virginia, with services duplicated across two availability zones AZs. Each availability zone consists of one or more discrete datacenters, each with redundant power, networking, and connectivity, housed in separate facilities, and physically and operationally isolated from the other availability zones. Services are load-balanced across both AZs and each AZ can take over for the other in the case of an outage. Failover is near instantaneous. All data and machine configurations are further replicated to the us-west-2 region in Oregon for disaster recovery. In the event of both us-east-1 AZs becoming unreachable, we will failover to our Oregon AZ. Our RPO is 3 hours and RTO is 12 hours for a full disaster recovery scenario. Full database backups occur weekly. Databases use full transaction logging, with the transaction logs backed up multiple times throughout the day. Backups are encrypted and are tested weekly as part of automated testing and validation scripts. Slate has a feature called Time Warp that allows administrative users to mount a backup copy of their Slate database from a specific point of time. We have never lost data or had any kind of catastrophic failure of hardware or software that has resulted in any downtime.

- 4.5.2.3 Data: Describe the process to request copies of our data. Will data be provided in a format where it can be brought into MS SQL Server or Oracle for examination on campus? If not, please provide examples of what would be received in a flat file.

The institution can request a full backup copy of their database at any time. In the standard agreement we also agree to provide the data to University of Wisconsin - Whitewater in a commercially reasonable format. Since inception, we have maintained 100% client retention.

- 4.5.2.4 Audit: Please describe the process in place to track who has accessed UWW data. How is this information obtained by the campus?

Audit

Slate employs a number of auditing tools, including test environment, time warp (allowing to restore their data to a specific point in time from the past 90 days), retention policies, and unused resources to see what fields, etc., they have not used as yet in Slate.

Logs

Extensive audit logs are maintained for all activities within Slate. An audit trail logs all user actions and the date/time at which the actions occurred, leaving a reportable and searchable trail of all activity that occurs within the database, and a report of these actions can be provisioned directly by authorized users.

- 4.5.2.5 Guarantees/Assurances: Please summarize information from the SLA regarding uptime, performance, and disaster recovery.

Please see the existing service agreement in place between Technolutions and University of Wisconsin - Whitewater Graduate Business Program.

4.6 Functional Requirements (600 points)

4.6.1 Relationship Management

- 4.6.1.1 Describe how your CRM manages relationships across the student lifecycle from applicant to admitted student to enrolled student to alumni/donor.

The entire admission lifecycle from name purchase (prospect), to recruitment efforts (inquiry), through the entire application and review process (applicants) can be managed within Slate. This includes all communications, events, application build and submission, application review, and decision release. All interactions with students are tracked on the student timeline and are available for queries and reports. Person status and application statuses are easily viewable on the person record, allowing schools to see at a glance where in the process a specific person is.

Slate can be used beyond the initial application process to include the broader student lifecycle. We have organizations using Slate's robust features and functionality to manage post-enrollment processes, online

portals for students and staff, transfer credit evaluations, student registration, retention, student success, and more. Many organizations continue to use Slate to support current students including student affairs offices, career service centers, and even human resources. Finally, Slate's advancement functionality extends these capabilities even further with relationship management, fundraising, and other specific business process requirements of modern institutional advancement offices. Slate provides nuanced permissions allowing partners to control both what a user can do but also to whom they can do it. Thus each part of the process can be tailored to the appropriate staff as the student moves through their lifecycle.

- 4.6.1.2 Identify how your CRM supports activity and functions related to the areas of student recruitment and admission; highlighting the tools and functionality available with your product specific to this area.

Slate was built specifically for college admissions (graduate and undergraduate). Slate supports business processes rather than dictates as most software does. It is completely customizable to meet each organization's business needs. There are many features outlined in the included white paper that show how Slate is the pre-eminent software system for college admission offices. Throughout its history, Technolutions has maintained a 100% client rate, without exception. This is unparalleled within the field and reflects the unrivaled quality of product and service provided. Slate is a unique, world-class software system that brings all aspects of admissions recruitment and applications together in a single package. All data is integrated, and there is no need for third party sources. Please see the included white paper for more details.

- 4.6.1.3 Identify how your CRM supports activity and functions related to the areas of student support and enrollment services; highlighting the offices/functions served (financial aid, registration, etc.) and the tools and functionality available with your product specific to these areas.

Slate can be used beyond the initial application process to include the broader student lifecycle. We have organizations using Slate's robust features and functionality to manage post-enrollment processes, online portals for students and staff, transfer credit evaluations, student registration, retention, student success, and more. Many organizations continue to use Slate to support current students including student affairs offices, career service centers, and even human resources.

- 4.6.1.4 Identify how your CRM supports activity and functions related to the areas of alumni relations and donor development; highlighting the tools and functionality available with your project specific to this area.

Slate can be licensed with or without its advancement functionality, which provides, in addition to its comprehensive CRM, gift management functionality for advancement offices to capture and track one-time and recurring gifts, pledges, planned gifts, in-kind contributions, scholarships, and proposals.

The feature set is unrivaled:

- *Comprehensive CRM and Gift Management*

- *Gift management, including online gifts, outright gifts, pledges, pledge payments, recurring gifts, and in-kind gifts*
- *Alumni volunteer portal*
- *Opportunity identification*
- *Relationship management*
- *Manage events and communications to alumni, donors, and more*
- *Outreach and Marketing*
- *Email and SMS mail-merge communications delivery*
- *Drip marketing campaigns*
- *Inbox management for shared mailbox and communications tracking*
- *Data visualization tools to identify prospects*
- *Printing collateral platform*
- *Events and Travel Scheduling*
- *Event registration and automated communications*
- *Interview scheduling, video essays and video interviewing*
- *Travel and expense management*
- *Communication*
- *Live webinars with slide sharing, audio, video, and chat*
- *AI chatbots powered by your institutional FAQs*
- *Telephony service*
- *Reporting and Data*
- *Graphical query, dashboard, and report builders*
- *Predictive modeling using machine-learning algorithms*
- *Integrated analytics and user-identifiable website tracking*
- *Data Management*
- *Document management and digital imaging*
- *Digital portfolios, media conversion, and media hosting*
- *Real-time web services and data feeds*
- *Integrated data transformation systems for imports and exports*
- *Robust data deduplication*
- *Dataset storage of organizations, contacts, alumni, etc.*
- *Integration with all major information systems and ERPs, including homegrown*

4.6.2 Communication

- 4.6.2.1 Describe how your CRM supports higher education communication strategies, campaigns, and workflows with prospective students, currently enrolled students, and alums.

Institutions are looking for a variety of ways to communicate with their constituents, both electronically and print, and they wish to target specific groups. Slate is designed to keep up with the wants and needs of our clients. Slate has very robust communication capabilities. Email communications may be sent as a mass communication, either scheduled, ongoing, or as an individual mailing. Event registration communications, form response communications, reminder communications pertaining to events, and follow-up communications may be customized and automated. Communication channels include print, email, and text message. Additionally social media channels can be linked to post communications through Slate, and portals can display updates to the constituents. Multiple constituents Slate allows organizations to be in contact with students, alumni, parents, and other constituencies. As a

comprehensive system, Slate aggregates all of the touch points onto a unified person record. These include event and form registrations, email activity (with the ability to view the content of the sent email in the person record), application data and activity, imported data, and all other related data points. Filtering may be done on any number of criteria, including person type.

Communication flows may be customized and automated to accommodate an institution's needs. Queries are built for general communication flow. Filters can work off relative dates and can be based upon other events, such as receiving or interacting (opening or clicking on a link) with another communication. All outreach campaigns are specifically designed by the client to audiences chosen by the organization. Slate allows for the creation of drip marketing or automated, sequenced communications using populations. Created via rules, populations are defined by any criteria that exist on a person record. Upon meeting the criteria for the population, records fall into populations and therefore into email campaigns. Email campaigns leverage population filters that allow users to filter by timestamp or timestamp days, the latter of which allows users to configure emails to fire 1, 10, 20, etc., days after a record has entered a population. If a record changes and no longer meets the criteria for a population rule, that individual exits the population and, as a result, falls out of the email campaign. Records may exist in multiple populations at any given point. Additional criteria may be layered with the population filters to further segment the communications associated with various campaigns, including web traffic activity that is collected via ping. For example, a population that contains freshman inquiries may have an additional communication regarding scholarships targeted at records who have spent more than 60 seconds viewing a financial aid page. There are no limitations on the number of communications that may be a part of a drip campaign and schools may opt to include text messaging in tandem with email communications.

To track the workflow of a business process, this may be accomplished using a combination of queries and communications; however, the report builder and other features may be involved depending on the project. The Projects feature allows schools to organize day-to-day administrative workflows as tasks. Tasks can be created automatically or manually, and they can be linked directly to records or tools within Slate. If a user is viewing a record, they will be able to see any incomplete tasks that are associated with that record for projects to which they have access.

- 4.6.2.2 List all types of communication channels (print, email, text, phone, chat, hosting webinars, etc.) available.

Communication channels include print, email, and text message. Additionally social media channels can be linked to post communications through Slate, and portals can display updates to the constituents. A fully featured webinar platform, Share, is part of Slate at no additional cost. Features include the ability to broadcast live streaming audio, video, and content from PowerPoint slide decks, PDF documents, URL video content, and image files. Presenter screen sharing is also possible when running a Share event via Slate's share screen feature. This platform also offers open and moderated chat functionality with saved transcripts. The Share recording feature records the full content from any online webinar hosted through Slate's Share platform for playback later. When conducting an online webinar, the Share bridge allows the ability to include a conference bridge for two-way audio. Instead of using a separate phone line, audio from both presenters and participants can be included directly within Share and even recorded to use later. As part of Slate, all participant registration and attendance information is recorded in their Slate person record history. For any online event using Share, Slate can record and transcribe the dialog using real-time closed captioning.

Automated chatbots are supported through our Inbox Live feature. The institution can create a list of questions and answers, and an artificially intelligent bot will use natural language processing to converse with a person and return the appropriate answers. The conversation can happen through SMS or through Facebook Messenger. If the bot is not able to answer a question, it can escalate to a staff member through our Inbox feature. In order to speed up the creation of the question-and-answer list, your institution's FAQ pages can be automatically imported and analyzed to find questions and answers.

4.6.2.3 Provide examples of message content, message format, and how the communication is created and tracked.

Slate provides a wide array of email communications capabilities. Email automation is driven by queries, providing the entire selection of exports (merge fields) and filters available in queries and reports to all types of electronic communications. This enables the selection of a precise recipient group with the capability to include all desired data points in the messaging. Mailings can be run on-demand, scheduled, on an on-going basis, or configured as a part of an on-going drip marketing campaign. Multiple templates can be created in Slate to allow for one-click adding of an email template. Users can create templates, modify templates, or modify the template as needed for a specific communication. Mailings can also be copied if the same content is desired with minor changes. Full email analytics are provided and splits are supported.

Formatting-rich HTML communications can be built through a drop-and-drag web-based editor without any required HTML knowledge, and text counterparts are automatically generated to ensure readability on down-level devices. If an unsubscribe group is selected, unsubscribe instructions and links are automatically added to the mailings, providing the recipients with a two-click opt-out. All messages employ open and click tracking, in addition to bounce-back handling and spam complaints, through feedback loop registrations. The messages can contain any number of merge fields or conditional logic in the body or in any header like the subject. These can range from simple content substitution to more complex "if...then" logic. Technolutions is white listed with the major email service providers and only non-commercial emails are sent through its systems, so deliverability is exceptionally high. Slate sends all HTML messages with plain text counterparts that are automatically generated to closely resemble the HTML messages.

Slate's Deliver feature offers a rich set of communications capabilities, including bounce-back tracking, suppression lists, open and click tracking, delivery analytics, and integration with the person record, among other capabilities. Slate provides previews of emails as to how they would render on a typical desktop vs a mobile device. Specific records can be used to display a sample message of a particular mailing. There are no limits to how many messages can be sent as part of one mailing or how many messages can be sent per year. Slate sent over 2.1 billion email messages in 2018. All email campaigns are stored in Slate. Every email sent to a person may be viewed on the person record. Multiple email addresses may be stored on the person record and used for communication with the person. Email addresses can be ranked to note the priority of each email address. Email communications may be resent as an individual message directly from the person record timeline. Mass emails may be sent through Deliver with no need for Outlook integration. Outlook integration is available to note messages sent or received through Outlook on a person's timeline. Mobile friendly Slate is completely mobile friendly. Templates should be designed to be mobile friendly. Deliver offers mobile device viewing to see how the messages and templates render. Soft Bounces For temporary or "soft" email bounces, Slate will continue to attempt to send the message until it is delivered for 72 hours.

Permanent Bounces All messages employ bounce-back handling and spam complaints through feedback loop registrations.

4.6.2.4 Identify communication options with prospective international students.

As a cloud-based solution, Slate is accessible around the world using any modern Internet browser. The Slate user interface is in English, and data from users is accepted using the Latin alphabet, but communications out to customers can take place in a wide variety of languages. The Slate Deliver module, for example, fully supports Unicode for all emails, allowing the sending of email in virtually any language.

4.6.3 Event Management

4.6.3.1 Describe how your CRM supports higher education event management.

Slate has a robust event management system for both on and off-site events. Users may choose which events are public, and event landing pages can be created to display all events or a subset of events online in calendar, list, or map format. Events can use templates to group similar types of events together. Specific locations are included for the events, and people may register for an event prior to it starting. Registration numbers, waitlists, and deadlines may be set. Lists of registrants are kept based on time of registration, and different data points for a registrant can be customized to display in the registrant list. Communications may be built into the event to acknowledge registration, send reminders before the event, or include a survey following the event. Event registration and participation are tracked within the event, and a source interaction is automatically added to the person record upon registration. Source interactions are updated when a person is marked as having attended or cancelled registration for an event.

Users may collect any information as mapped or unmapped fields on the registration form. Unmapped fields will store data but not be visible on the person record (though they are still accessible via the event registration). If an event registration is the first point of contact, a new person record will be created and a source interaction will automatically be added to the record. Personalized URLs can be used in emails sent from Slate to provide both click tracking as well as to bring constituents to pre-populated forms. Any data already present on the person record will be pre-filled on the form if a person accesses the form via a personalized URL.

Events are managed through folders, and folders may be made public or private for display on event landing pages. Events can be organized and configured from one location using event templates. Changes made at the template level automatically propagate down to individual events using the same template. A related events selector widget may be added to the event registration form to show other events happening at the same time and consolidate event registration for multiple events into a single registration form. All events and event fields are available for reporting purposes. Events associated with a location use Google Maps to display event locations, directions, etc. This data can be referenced in event communications.

Automated communications may be sent upon registration, update, cancellation, x number of hours before the deadline or event, and post-event. Registrants may also be automatically notified when moved from "waitlist" to "registered." Event-related information can be merged into the body of the message to customize the communication. Different follow-up messages may be sent for registrants after an event based on their attendance status. Messages may be sent via email, SMS, phone, and print postcards and letters. A satisfaction survey directly associated with the event may be part of the post-event follow up

communication. Survey responses are automatically aggregated and available in a dynamically generated report on the event page. QR codes are event specific codes that can be emailed or texted to registrants prior to an event as a part of an event communication. These codes can be presented at the time of the event to allow for a quick and easy check-in process, using the Slate app.

Slate implements the iCalendar (iCal) standard, and through this widely used format, Slate events can be easily shared with calendaring programs such as Google Calendar, Outlook and Mac Calendar. External iCal feeds can also be added into Slate events and interview calendars. Easily add US holidays, institutional calendars, staff calendars, and more directly into Slate, including any free/busy information. Attendance summaries are standard in Slate. When a registrant is checked in through the event, the person record is automatically updated with proper attendance status. Reports may be built to include year-over-year data. All event data may be exported in multiple formats, such as Excel, PDF, CSV, or HTML.

Event fees/payments may be collected for events, and the amount can either be static or calculated (such as charging an amount per guest). Technolutions has a payment gateway called Slate Payments, or schools may use their own payment gateway. Slate Payments allows for payments to be made before the form registration may be submitted. Slate integrates with mainstream payment providers, and registrants can be emailed with more information on how to pay for their registration.

- 4.6.3.2 List features available for planning and managing recruitment events, open house programs, campus tours, meetings, appointments, interviews, etc., including registration process, confirmations, event reminders, check-in, reporting, event follow-up, and surveys.

Event notes can be created for various types of events to track information, including costs. These data points can then be queried on and used in reports.

The Scheduler module is used to manage individual interviews, appointments, or other meetings where only one attendee is permitted. These may be included as part of an overall event registration using related events. Interview report forms may be attached to the individual slot for easy reporting purposes following the meeting. Live video interviews may also be conducted using Slate's Share platform. Registration and attendance data is captured at the event level and updated on the person record. Attendance at the event may be captured by scanning a supplied QR code for the event. Event registrants can be given the option of self-service check in. Geofencing is utilized for this feature, allowing registrants within 2 kilometers, or about 1.25 miles of the event location, to check in via a mobile device. Lists from other events - such as lists from barcode systems - may be imported using Upload Dataset. The uploaded records will create or update existing records and will automatically add a source interaction to the person record.

All communications for event invitation, RSVP, registration, reminder, and follow up may be customized and automated. Communications may be built into the event to acknowledge registration, send reminders before the event, or a survey following the event. Both one-time and recurring events can be created in Slate. Event registration forms can be customized for individual events. Slate public pages will have the same look and feel as the partner's website, and most users will see little difference as they transition from one site to the other.

Slate's form builder supports customizable and dynamic surveys. These surveys can be either tied to specific events for easier aggregate reporting or exist on their own. Surveys can be both user aware or anonymous and consume any number of questions. The form builder can show or hide entire sections, specific questions, or specific values within a question using conditional logic. It is also possible to optionally include any number of communications upon completion of the survey. Deadlines can be set for completing an event-specific survey. A satisfaction survey directly associated with an event may be part of the post-event follow up communication. Survey responses are automatically aggregated and available in a dynamically generated report on the event page.

4.6.3.3 Identify options for recruitment travel management (including high school visits and college fairs).

Slate has a robust event management system for both on and off-site events. Schools may choose which events are public, and event landing pages can be created to display all events or a subset of events online in calendar, list, or map format. Templates are built for events based on both on and off-campus visit programs. Specific locations are included for the events, and people may register for an event prior to the event.

Voyager is a powerful data visualization tool that allows users to plot and view data spatially. Users build queries which create custom layers on a map, allowing institutions to see where their prospects and applicants live, where organizations are located, and where events have been held. By overlaying census data from the American Community Survey (ACS), Voyager creates data visualizations for existing territories and explores areas with growth potential. The layers update dynamically as users navigate the map, allowing for easy data visualization across a desired geographic area.

Slate.org is a free tool for school counselors and community-based organizations. It eases the task of scheduling school visits, helps maintain awareness of where students reside in the admissions process, and allows for convenient and secure submission of materials directly to institutions. Slate undergraduate colleges and universities are automatically enrolled in Slate.org and can share applicant statuses, checklists, and decisions with high schools in Slate.org. Additionally, high schools can share school profile data, post visit and college fair availability, and invite colleges to attend events. Slate colleges and universities can sign up for open Slate.org events and accept or decline invitations within their Slate database.

4.6.3.4 Provide description of staff and volunteer management.

Portals enable volunteers, as well as other constituents that might not otherwise have direct access to Slate, to access and update certain information. For example, volunteer portals can enable volunteers to see their classmates and whether or not they have participated in an annual fund campaign. The portal editor provides a drag-and-drop interface for building custom, interactive landing pages and interfaces. The rules editor allows schools to build a wide range of business rules to automate and support business processes and operations. Recruiting territories and staff assignments can be defined and set based on geography, schools, citizenship, or custom data.

User access can be customized to allow read-only, update, or no-access to specific types of records, record attributes, components, or functions. Security roles are fully customizable. Slate provides feature-level, function-level, field-level, object-level, and population-level security, enabling granular control of access permissions and rights. An institution can create any number of custom permissions and roles,

each of which may contain any number of standard or custom permissions. A user may be assigned to any number of roles and will assume the security permissions from each. Feature-level and function-level permissions define what can be done. Field-level, object-level, and population-level permissions define with what those feature and function level permissions can be used. These population permissions allow segmentation across any number of attributes, including school, degree, program, or any combination thereof, along with any combination of other attributes. Slate has the capability to provision credentials directly, removing the requirement for the external constituent from having a campus account. User access is controlled via authentication (using the client's SSO solution) and authorization, where the client can set fine-grained permissions and roles for each user within Slate. Since Slate is web-based and uses campus authentication, Slate does offer a "Supervised Login" wherein a staff member must login before a student office worker can login. User roles can be fed from an external source into Slate via a data feed. Access via our RESTful web service to data generated via our query builder can be controlled via username and password.

4.6.3.5 Describe how your CRM integrates with Microsoft 365.

Slate integrates with Office 365. There is a native Slate plugin for Outlook that can be installed to associate emails to Slate accounts. Any mail merge to an Office 365 can be seamlessly integrated directly into Slate so that any such any query can be exported into an Office 365 template. Queries can be exported as Excel files and more.

4.6.4 Application Management

4.6.4.1 Describe how your CRM supports application submission, review, and admission decision- making.

Slate is designed to support multiple applications and workflows. Applications are stored relationally to student records, and a student record may contain any number of applications, including applications for the same term. Applications can be configured to either allow multiple applications from one record, or limit records to only submitting one application in a given term, time period, major, or other criteria. Each application can have its own data, materials, review history, and decisions, so a person may apply and be admitted to one program but not another. Workflow capabilities are highly customizable and automatable, enabling the Slate Reader to be customized to model all various processes of reading, evaluating, and routing applications. Workflows may be used when an application should be viewed and evaluated simultaneously for different processes, such as admission and financial aid review.

Decisions may be added to an application record individually or en masse using specific criteria. Slate keeps a decision trail, so an organization always knows what decision(s) have been added to the application record. A person may be waitlisted, then admitted, and then designated as paid. All decisions are stored and available for querying.

Safeguards are incorporated into the process to ensure proper assignment of decision letters. Emails are sent to the applicant indicating that a change has been made to their record. The applicant is then instructed to go to the applicant status portal to view the decision letter. Decisions are not sent through email.

4.6.4.2 List different types of application materials that can be submitted (text-based, audio, video, etc.)

Slate possesses digital portfolio capabilities and allows for uploads of audio and video media to any Slate application. Slate supports uploaded media files up to 5GB in size in the following file formats:

Video: .avi, .flv, .m1v, .m2v, .m4v, .mkv, .mov, .mpeg, .mpg, .mp4, .wmv

Audio: .aac, .aif, .aiff, .iff, .fla, .m4a, .mpa, .mp3, .ra, .wav, .wma

Slide: .bmp, .gif, .jpg, .jpeg, .png, .tif, .tiff

Document: .doc, .docx, .odg, .odp, .odt, .pdf, .ppt, .pptx, .rtf, .wpd.

Applicants are also able to submit a link to a webpage rather than uploading an html file.

4.6.4.3 List available application management related third party integrations (test score providers, transcript evaluation services, common application, etc.)

Slate supports many different integration mechanisms, including the ability to import and export data file flat files and consume data pushed to or pulled from an endpoint via web services. The integration mechanisms will vary based upon the method most suitable for a provider. Slate has a direct and automated data and document integration with The Common Application and The Coalition for Access, Affordability, and Success, Universal College Application. Slate is the largest consumer of data and documents from The Common Application. Data and documents are automatically downloaded in a nightly process and are imported and available to staff within minutes of the data being made available. Slate can directly load data and documents from CAS applications such as AMCAS, CASPA, LSAC (ACES), PharmCAS, PTCAS, SOPHAS, and VMCAS, as well as Questbridge and state application services. Slate provides built-in integrations with score data file providers including ACT, AP, GMAC, GRE, IELTS, SAT, and TOEFL, among others.

4.6.4.4 Describe how applicants, reviewers, recommendations providers can access your system to support their needs

Slate supports complexly-structured applications with dynamic questioning and robust processes for material collection including recommendations. Applications may include rich media capabilities such as video essays, video interviewing, and digital portfolios where individual media items of up to 5 GB each can be uploaded for real-time conversion to streaming media formats. Email is also integrated with the application to acknowledge activities such as application submission or to send requests to recommenders for recommendation letters. Applications are stored relationally to person records, and a person record may contain any number of applications, including applications for the same term (subject to whatever limitations a school may itself elect to impose). Each application can have its own data, materials, review history, and decisions so an applicant may apply and be admitted to one program but not another.

The Slate application supports online recommendation submissions. Upon listing a recommender in the application, Slate sends an email message to the recommender with a secure link to a form that uniquely identifies the recommender as well as the application for the applicant who has asked that they provide the recommendation. The recommendation form is easily customizable and allows recommenders to upload any relevant materials which should be associated with an applicant's application. Recommendation submissions can only be made from someone who has access to the email address

listed in the application and additional metadata, such as an applicant providing the recommender with a first draft of his/her letter of recommendation, is captured to identify potential recommendation fraud or manipulation.

The Slate Reader is an extremely robust and feature-rich reviewing environment, where all of the review bins, queues, materials, review forms, and dynamically generated reports and summary pages are brought together in a single interface. The workflow capabilities are highly customizable and automatable, enabling the Slate Reader to be customized to model all various ways of reading, evaluating, and routing applications. All data points captured along the way are available for consideration into the workflow process. iPad and Android apps allow remote access to Slate and the Reader. The Reader has a "bin" structure that offers some workflow from point of application to point of decision stage. Readers will be able to easily query for the applications they wish to review - freshman, by department, based on geography, any number of items. Organizations design their bin structure to match their review process, and we work with you to streamline this process. Schools determine which documents and order of documents to be seen in the Reader. All data is live in the Reader, so information is up to date. Review forms are completed by the reader and submitted through the Reader. When a reader form is submitted, the application can be set to move on to the next Reader bin and may be sent to a specific individual to be read next. Each reader has a queue which contains applications the reader has checked out. The Reader is very visual and allows anyone with proper permissions to quickly see who has an application checked out and who has previously read an application. Bins may be designed so applications can be checked out by a single reader or by more than one reader at a time. Documents may be imported from electronic sources and indexed to the application record. Some specialty applications (Common Application, the Centralized Application Service applications used by various professional programs, for example) and documents are imported on an overnight basis without any human interaction. Documents coming in via paper may be scanned and indexed to the applicant record. Checklist rules monitor the documents to determine while a file is complete.

- 4.6.4.5 Describe functionalities and best practices your system supports to increase admission yield rates (ratio of admits to enrollees)

4.6.4.6

Slate allows for the consolidation of multiple systems into a single environment that encompasses recruitment, processing, reading, and the releasing of decisions from a centralized platform. With unlimited data storage and the ability to create unlimited users, Slate affords schools the opportunity to centralize processes and create a cohesive environment for managing students. Slate has been built and iterated upon over the years based on the recommendations and feedback we have received from our vibrant user community, resulting in a core product that, out-of-the-box, meets the demands of a modern admissions office. Through the automation of previously manual processes, Slate frees up employees to focus on their core jobs of recruiting and supporting students throughout the enrollment funnel. As a result of the internal efficiencies Slate creates and the time that can now be allocated to building these relationships, schools often see an increase in both the number and quality of applications received year-over-year.

Please see attached white paper for additional details.

4.6.5 Data and Reporting

- 4.6.5.1 Describe how your CRM can import data, model enrollment, analyze data, and design reports for university recruitment and retention.

Slate has an extensive list of standard import packages, including all major search lists and score data files. Demographic data is mapped, and institutions may choose to map additional fields. Once mapped, however, they remain mapped. All data from the import (even unmapped fields) is accessible on the person record. Any number of the same test type may be uploaded and stored as part of the person record. Custom imports may also be built. While viewing an individual source format, users are able to see the uploaded sources associated with the source format along with the status and number of records imported. Records are matched on first name + last name + birthday or first name + last name + email address to limit the number of duplicate records. Standard layouts are based on updates we receive from the companies where data feeds originate. Many of these sources have standard Slate feeds of data. Updates are made when new layouts are available. Often old layouts are kept in production until all institutions have moved to the new layout. All data transfers are intuitive. Files are uploaded, and sample data appears along with header names. These are matched to fields in Slate in column format. Any translation of data to prompt lists happens once all fields have been mapped. Both sections are through drop-down boxes.

Slate provides powerful reporting tools that enable year-to-year, predictive modeling, and crosstab reports containing data tables, charts, geo maps, and scattergrams. All data points and communications in Slate are available for reporting. Report builder also runs in real-time, enabling changes on a record to be reflected immediately in a report the next time it is run. We are happy to provide sample reports that have been built using these tools and have not required any custom SQL programming. Reports may be emailed to parties on a scheduled basis.

Our Predict feature allows organizations to apply machine learning principles to data to make predictions about outcomes (e.g. will a student enroll; will a prospect donate money). Partners can use the query builder to define a set of historical data (a defined population and a selection of data points) and use built-in or custom data filters to define the desired outcome. The system will then construct a series of mathematical models based on this data. We construct multiple models using different, commonly used machine learning algorithms such as Decision Tree, Naive Bayesian, Linear Regression, Logistic Regression, etc. We construct the models using 80% of the historical data you've defined, and then test the predictive ability of those models on the remaining 20% of the data to produce an approximate accuracy of the model. Organizations can then define a target population. We will use the models to make an outcome prediction for each member of the target population, based on the same data points defined in your historical data. Those outcome predictions will be stored with each person record and can be accessed individually or in bulk as part of queries, exports, rules, etc.

- 4.6.5.2 Identify opportunities for delivered reports, custom reports, and dashboards for segments of target populations.

Slate provides powerful reporting tools that enable year-to-year, predictive modeling, and crosstab reports containing data tables, charts, geo maps, and scattergrams. All data points and communications in Slate are available for reporting. Report builder also runs in real-time, enabling changes on a record to be reflected immediately in a report the next time it is run. We are happy to provide sample reports that have

been built using these tools and have not required any custom SQL programming. Reports may be emailed to parties on a scheduled basis.

There are several dashboards that you will find in Slate. The homepage is an area where charts and graphs may be created to show any number of data points. This area can be customized using user or role-specific reports. The person record dashboard is customized based on constituent data. The Reader homepage is also an area where charts and graphs may be created as they are with the homepage.

- 4.6.5.3 Provide how the integration of data from other sources (test scores, purchased names, student contacts) may be used in reporting.

All data points in Slate are available for use in queries and reports.

- 4.6.5.4 List how your CRM measures the success of recruitment campaigns (email open rate, yield rate from events and travel, etc.).

Full email analytics are provided and splits are supported. All messages employ open and click tracking, in addition to bounceback handling and spam complaints, through feedback loop registrations. Slate supports activity and engagement scoring, from simple additive methods (e.g. 1 point for opening an email, 2 points for clicking on a link, 10 points for a visiting campus), to gate-based methods (e.g., level 1 for opening an email, level 5 for visiting campus irrespective of any other event), to polynomial regressions.

Slate forms can also capture UTM parameters. Any number of data points required for measuring the success of recruitment campaigns may be included in reports.

- 4.6.5.5 Describe predictive analytic options.

Our Predict feature allows organizations to apply machine learning principles to data to make predictions about outcomes (e.g. will a student enroll; will a prospect donate money). Partners can use the query builder to define a set of historical data (a defined population and a selection of data points) and use built-in or custom data filters to define the desired outcome. The system will then construct a series of mathematical models based on this data. We construct multiple models using different, commonly used machine learning algorithms such as Decision Tree, Naive Bayesian, Linear Regression, Logistic Regression, etc. We construct the models using 80% of the historical data you've defined, and then test the predictive ability of those models on the remaining 20% of the data to produce an approximate accuracy of the model. Organizations can then define a target population. We will use the models to make an outcome prediction for each member of the target population, based on the same data points defined in your historical data. Those outcome predictions will be stored with each person record and can be accessed individually or in bulk as part of queries, exports, rules, etc.

- 4.6.5.6 Describe how your CRM can analyze data to qualify leads and identify prospective students most likely to be admitted and enroll.

Slate supports activity and engagement scoring, from simple additive methods (e.g. 1 point for opening an email, 2 points for clicking on a link, 10 points for a visiting campus), to gate-based methods (e.g., level 1 for opening an email, level 5 for visiting campus irrespective of any other event), to polynomial regressions.

- 4.6.5.7 List options for recruitment territory management and to assign prospective students to staff.

The rules editor allows schools to build a wide range of business rules to automate and support business processes and operations. Recruiting territories and staff assignments can be defined and set based on geography, schools, citizenship, or custom data.

- 4.6.5.8 Describe best practices with your CRM in regard to interfaces with a student information system, specifically identifying in which system data is stored at each point along the prospect to enrolled student timeline.

Most of our partner institutions transfer data bidirectionally between Slate and their campus CRM and Slate and other databases as needed. Partners can use file transfer via SFTP or RESTful web services for such integration, providing both batch and real-time data transfer. Most commonly, the data exchange is implemented as a transfer of flat-files on a scheduled basis through an SFTP server, where the specifications for the data exchange can be dictated by the institution and where all of the value and code translation (for country codes, major codes, term codes, etc.) happens within Slate. The data feeds typically are limited to applicant and financial aid data. The data points from Slate to the SIS typically include the applicant biographic and demographic data, as well as the key application components that are necessary outside of admissions. A Slate ID is also sent, along with a placeholder for the SIS ID. A return feed is then provided wherein the Slate ID is sent along with the SIS ID to which the record was matched or for which a record was created. Subsequent data feeds from Slate into the campus system would then include that identifier for direct matching.

4.6.6 Activity Tracking

- 4.6.6.1 Describe how your CRM manages student contact and tracks activity across the student lifecycle.

Slate allows schools to be in contact with students, alumni, parents, and other constituencies. As a comprehensive system, Slate aggregates all of the touch points onto a unified person record. These include event and form registrations, email activity (with the ability to view the actual email in the person record), application data, uploaded data, and all other related data points. Filtering may be done on any number of criteria. The timeline houses all communications with persons. Data imported, received through form submission, or received through event registrations are automatically added to the person record. Emails sent to and received from the person may be viewed in their entirety on the interactions tab. Custom interactions can be created to log interactions held outside of Slate, such as mailed print pieces.

4.6.6.2 Identify contact methods, including inputting, storage and maintenance of contact information, available for recruitment and retention initiatives.

Institutions are looking for a variety of ways to communicate with their constituents, both electronically and print, and they wish to target specific groups. Slate is designed to keep up with the wants and needs of our clients. Slate has very robust communication capabilities. Email communications may be sent as a mass communication, either scheduled, ongoing, or as an individual mailing. Event registration communications, form response communications, reminder communications pertaining to events, and follow-up communications may be customized and automated. Communication channels include print, email, and text message. Additionally social media channels can be linked to post communications through Slate, and portals can display updates to the constituents. Multiple constituents Slate allows organizations to be in contact with students, alumni, parents, and other constituencies. As a comprehensive system, Slate aggregates all of the touch points onto a unified person record. These include event and form registrations, email activity (with the ability to view the content of the sent email in the person record), application data and activity, imported data, and all other related data points. Filtering may be done on any number of criteria, including person type.

Slate provides real-time validation of email addresses by automatically checking email address formatting if email is included on a form submission. Mailing addresses are validated and standardized through an address validation and standardization service. Slate incorporates international address standards to the extent possible. Phone numbers are standardized based upon the country code. This standardization enables robust deduplication of person data as part of more than two dozen standard matching processes in Slate. Names and addresses are normalized in an overnight process. Other text is saved "as is" unless a specific formatting mask has been applied. Telephone numbers and addresses are stored individually, and one record might contain multiple addresses, phone numbers, and/or email addresses. Persons may have different mailing addresses and permanent addresses, and Slate can export an "active" address for quick access of a record's current address. Addresses, phone numbers, email addresses, and other devices can be prioritized specific to the record. Organizations may store any number of email addresses, telephone numbers and street addresses in Slate. Each type of address or device may also be given a priority (high, low, normal, inactive) which may be used when building queries for communications, reporting, etc.

4.6.6.3 List options for use of a student portal.

The web portal framework provides the ability to construct custom-built web pages that access Slate data. This data may be displayed in a variety of ways, including charts and graphs, and access to this data can be restricted as desired. Customized content may be displayed based on the audience. Portals can be used to allow broader audiences to use and modify Slate data. Example portals are provided for alumni, coaches and athletic staff, school counselors, and admitted students. Portals can be customized with the organization's branding, which may include individual branding by department. Slate provides a student portal where all applicants can view updates to their checklist, upload materials including media files, confirm addresses, receive online decision letters, accept offers of admission and pay deposits. The student portal can be customized to include news and event feeds from either Slate or any outside sources. The portal can be designed using the WYSIWYG editor to allow for customized and dynamic content based on the specific attributes of a given student and any other data points contained within Slate. Many partners include Twitter and Facebook feeds as well as any type of embedded content from the institution website.

4.6.6.4 Describe options to integrate and track recruitment efforts across campus (athletics, arts, etc.).

As a comprehensive system, Slate aggregates all of the touch points onto a unified person record. These include event and form registrations, email activity (with the ability to view the actual email in the person record), application data, uploaded data, and all other related data points. Filtering may be done on any number of criteria. The timeline houses all communications with persons. Data imported, received through form submission, or received through event registrations are automatically added to the person record. Emails sent to and received from the person may be viewed in their entirety on the interactions tab. Custom interactions can be created to log interactions held outside of Slate, such as mailed print pieces. User access can be customized to allow read-only, update, or no-access to specific types of records, record attributes, components, or functions. Security roles are fully customizable. Slate provides feature-level, function-level, field-level, object-level, and population-level security, enabling granular control of access permissions and rights. An institution can create any number of custom permissions and roles, each of which may contain any number of standard or custom permissions. A user may be assigned to any number of roles and will assume the security permissions from each. Feature-level and function-level permissions define what can be done. Field-level, object-level, and population-level permissions define with what those feature and function level permissions can be used. These population permissions allow segmentation across any number of attributes, including school, degree, program, or any combination thereof, along with any combination of other attributes. Slate has the capability to provision credentials directly, removing the requirement for the external constituent from having a campus account. User access is controlled via authentication (using the client's SSO solution) and authorization, where the client can set fine-grained permissions and roles for each user within Slate. Since Slate is web-based and uses campus authentication, Slate does offer a "Supervised Login" wherein a staff member must login before a student office worker can login. User roles can be fed from an external source into Slate via a data feed. Access via our RESTful web service to data generated via our query builder can be controlled via username and password.

The web portal framework provides the ability to construct custom-built web pages that access Slate data. This data may be displayed in a variety of ways, including charts and graphs, and access to this data can be restricted as desired. Customized content may be displayed based on the audience. Portals can be used to allow broader audiences to use and modify Slate data. Example portals are provided for alumni, coaches and athletic staff, school counselors, and admitted students. Portals can be customized with the organization's branding, which may include individual branding by department. Slate provides a student portal where all applicants can view updates to their checklist, upload materials including media files, confirm addresses, receive online decision letters, accept offers of admission and pay deposits. The student portal can be customized to include news and event feeds from either Slate or any outside sources. The portal can be designed using the WYSIWYG editor to allow for customized and dynamic content based on the specific attributes of a given student and any other data points contained within Slate. Many partners include Twitter and Facebook feeds as well as any type of embedded content from the institution website.

- 4.6.6.5 Identify aspects of the CRM that supports student success (early warning, conduct, advising, reminders, milestones, etc.).

Rules and communications can be used to add tasks to advisors and other users or send emails to internal users when certain conditions are met, which might include the presence or absence of certain data points, such as registering for classes by a particular deadline. Where these data points would exist outside of Slate, they would need to be included in the data feed into Slate to be consumed there and available to rules and communications.

- 4.6.6.6 Describe how your CRM supports tracking outreach and inbound marketing efforts (lead conversion tracking, etc.)

Slate allows for the creation of drip marketing or automated, sequenced communications using populations. Created via rules, populations are defined by any criteria that exist on a person record. Upon meeting the criteria for the population, records fall into populations and therefore into email campaigns. Email campaigns leverage population filters that allow users to filter by timestamp or timestamp days, the latter of which allows users to configure emails to fire 1, 10, 20, etc., days after a record has entered a population. If a record changes and no longer meets the criteria for a population rule, that individual exits the population and, as a result, falls out of the email campaign. Records may exist in multiple populations at any given point. Additional criteria may be layered with the population filters to further segment the communications associated with various campaigns, including web traffic activity that is collected via ping. For example, a population that contains freshman inquiries may have an additional communication regarding scholarships targeted at records who have spent more than 60 seconds viewing a financial aid page. There are no limitations on the number of communications that may be a part of a drip campaign and schools may opt to include text messaging in tandem with email communications.

Slate supports custom portals and landing pages, which can be used to deliver personalized content when sent with personalized links in emails and text messages. These landing pages can also show dynamic content when linked from social campaigns. The Ping analytics tool records UTM codes and tracks referring sources, including social media, and all page accesses where the Ping tracking code has been embedded. Retargeting is possible when using tools within Slate to export, on an automatic and scheduled basis, populations to Facebook custom audiences, for example. All email opens and clicks are tracked back to the constituent record, and SMS clicks are similarly tracked and recorded.

- 4.6.6.7 Describe options available to monitor and track stealth browsing

Slate's Ping is an analytics service that records user-specific web traffic and associates the history with Slate records. By adding a snippet of code to any part of your institution's website, you can track visits on that site and match them to person records in Slate. If a prospect visits your website before they have a record in Slate, Slate will remember their visits and retroactively attempt to match those visits up with their record after it exists. This data can then be used in queries, reports, and predictive modeling as a measure of a level of engagement, areas of interest, and initial point of contact.

4.6.7 Integration

- 4.6.7.1 Describe how your CRM can be integrated with Image Now/Perceptive Concepts and Oracle PeopleSoft Enterprise.

Slate works with many different document management systems. We recommend that files be sent using the DIP format, wherein a ZIP archive is generated containing PDFs/TIFFs of the documents to be imported along with an index file containing the filename of each document and any associated metadata parameters (an SIS ID and document type, for example). Slate can then extract the documents and index file and import the documents onto the appropriate person records. Slate can also extract metadata from within a filename, so institutions may have files with an SIS ID and document code in the filename and obviate the need for an index file, but usually the DIP approach works best. We recommend encapsulating all of these documents into a ZIP file, since SFTP is more efficient with the transmission of a single file (e.g., a ZIP archive) instead of with the transmission of thousands of individual files. We also prefer PDFs to TIFFs, since a digital PDF of non-scanned data would be a fraction of the size of a TIFF, and a TIFF is a rasterized/bitmapped image that won't contain any digital text content and thus cannot be enlarged beyond the original resolution without a loss of fidelity. The most popular document management systems that institutions are using include OnBase, ImageNow, Docfinity, and BDMS. Technolutions works with over 150 institutions that interface bidirectionally between Slate and PeopleSoft. Partner institutions can use file transfer via SFTP or RESTful web services for such integration, providing both batch and real-time data transfer. Most commonly, the data exchange is implemented as a transfer of flat files on a scheduled basis through an SFTP server, where the specifications for the data exchange can be dictated by the institution and where all of the value and code translation (for country codes, major codes, term codes, etc.) happens within Slate. The data points from Slate to PeopleSoft typically include the applicant biographic and demographic data, as well as the key application components that are necessary outside of admissions. A Slate ID is also sent, along with a placeholder for the PeopleSoft ID. A return feed is then provided wherein the Slate ID is sent along with the PeopleSoft ID to which the record was matched or for which a record was created. Subsequent data feeds from Slate into PeopleSoft would then include that identifier for direct matching. Please see Slate Technical Details for detailed information on data integration with SIS.

- 4.6.7.2 Identify the significant systems commonly used in higher education that integrate with your CRM.

Slate has integrated successfully with a wide variety of software applications including SIS systems such as Banner, PeopleSoft and Colleague, business intelligence solutions, enterprise content management systems, etc.

- 4.6.7.3 Does a typical installation require interaction with other vendors and/or subcontractors? If so, please describe this.

There are no third-party vendors or subcontractors required as part of the solution. The service providers are the employees of Technolutions.

Tab 3

Please see Attachment H in separate envelope

Tab 4

Attachment A

STATE OF WISCONSIN
 DEPARTMENT OF ADMINISTRATION
 DOA-3832 (R 07/2019)
 S. 16.72 WIS. STATS



Bidder Required Form

Instructions: Bidder is required to complete all sections of this form. (Note: If the agency checks the box preceding Section 5 indicating that section is not applicable to the bid/proposal, Bidder may skip Section 5. Bidder may not skip any other sections of this form).

To be completed by the agency:

Agency Name	Solicitation Title	Solicitation Reference Number
-------------	--------------------	-------------------------------

Section 1: Bidder Information			
Bidder/Proposer Company Name: Technolutions, Inc.			
E-Mail Address: slate-proposals@technolutions.com			
Phone Number: (203) 404-4835	Toll Free Phone:	Fax: (203) 404-4837	
Address: 234 Church Street, 15th Floor			
City: New Haven	State: CT	Zip: 06510	
Mailing Address for Purchase Orders (if different than above)			
Address:			
City:	State:	Zip:	

Section 2: Bidder Contacts	
List the name and title of the person to contact for questions related to each of the topics below:	
Bid/Proposal	Phone:
Email: slate-proposals@technolutions.com	(203) 404-4835
Affirmative Action Plan	Phone:
Email: slate-agreements@technolutions.com	(203) 404-4835
Orders and billing	Phone:
Email: ap@technolutions.com	(203) 404-4835

Section 3: Bidder Reference

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used with requirements like those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name:

University of Wisconsin-Whitewater

Address (including City, State, Zip):
800 W. Main Street, Whitewater, WI 53190

Contact Person:
Jessica Brady

E-Mail Address:
bradyj@uww.edu

Phone:
(262) 472-2136

List Product(s) and/or Service(s) Used:
CRM Software

Company Name:

University of Minnesota Graduate School

Address (including City, State, Zip):
101 Pleasant Street SE, Minneapolis, MN 55455

Contact Person:
Suzan Koroglu

E-Mail Address:
korog001@umn.edu

Phone:
(612) 625-2306

List Product(s) and/or Service(s) Used:
CRM Software

Company Name:

Marquette University Graduate School

Address (including City, State, Zip):
Milwaukee, WI 53233

Contact Person:
Katie Ruetz

E-Mail Address:
katie.ruetz@mu.edu

Phone:
414-288-4880

List Product(s) and/or Service(s) Used:
CRM Software

Company Name:

University of Connecticut Graduate School

Address (including City, State, Zip):
438 Whitney Road Extension

Contact Person:
Marie LeBlanc

E-Mail Address:
marie.leblanc@uconn.edu

Phone:
(860) 486-0978

List Product(s) and/or Service(s) Used:
CRM Software

Section 4: Designation of Confidential and Proprietary Information

The attached material submitted in response to this bid/proposal includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released without our written approval.

Prices always become public information when bids/proposals are opened, and therefore cannot be kept confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats., as follows: "Trade Secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released:

Section	Page #	Topic

Using the boxes below, indicate your agreement with the following statements:

- In the event the designation of confidentiality of this information is challenged, the bidder/proposer hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and agrees to hold the state harmless for any costs or damages arising out of the state's agreeing to withhold the materials.
- The state considers other markings of confidential in the bid/proposal document to be insufficient. The bidder/proposer agrees to hold the state harmless for any damages arising out of the release of any materials unless they are specifically identified above.

Agency Only:

- Section 5 is not applicable to this bid/proposal. If this box is checked, Bidder may skip to Section 6.

Section 5: Bidder Agreement: Wisconsin's Cooperative Purchasing Service

Wisconsin statutes (s. 16.73, Wis. Stats.) establish authority to allow Wisconsin municipalities to purchase from state contracts. Participating in the service gives vendors opportunities for additional sales without additional bidding. Municipalities use the service to expedite purchases. A "municipality" is defined as any county, city, village, town, school district, board of school directors, sewer district, drainage district, vocational, technical and adult education district, or any other public body having the authority to award public contracts (s. 16.70(8), Wis. Stats.). Federally recognized Indian tribes and bands in this state may participate in cooperative purchasing with the state or any municipality under ss. 66.0301(1) and (2), Wis. Stats.

Interested municipalities:

- Will contact the contractor directly to place orders referencing the state agency contract number; and
- Are responsible for receipt, acceptance, and inspection of commodities directly from the contractor, and making payment directly to the contractor.

The State of Wisconsin is not party to these purchases or any dispute arising from these purchases and is not liable for delivery or payment of any of these purchases.

Bidders/Proposers may or may not agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities. A vendor's decision on participating in these services has no effect on awarding this contract.

Bidder: Please indicate your willingness to furnish the commodities or services to Wisconsin municipalities by checking the appropriate box below.

I Agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities with any special conditions noted below.

I Do Not Agree to furnish the commodities or services to Wisconsin municipalities.

A vendor in the service may specify a minimum order sizes by volume or dollar amount, additional charges beyond normal delivery areas, or other minimal charges for municipalities.

Special Conditions (if applicable):

Section 6: Bidder Identification (Check all that apply)

We claim minority bidder preference [Wis. Stats. 16.75(3m) (b)(3)]. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED Minority Business Enterprises. Bidder must be certified by the Wisconsin Supplier Diversity Program. If you have questions concerning the certification process, contact the Wisconsin Supplier Diversity Program, 6th Floor, 101 E. Wilson St., Madison, WI 53703, (608) 267-9550. **Does Not Apply to Printing Bids.**

We claim disabled veteran owned business bidder preference [Wis. Stats. 16.75(3m) (b)(3)]. Under Wisconsin Statutes, a 5% preference may be granted to CERTIFIED Disabled Veteran Owned Businesses. Bidder must be certified by the Wisconsin Supplier Diversity Program. If you have questions concerning the certification process, contact the Wisconsin Supplier Diversity Program, 6th Floor, 101 E. Wilson St., Madison, WI 53703, (608) 267-9550. **Does Not Apply to Printing Bids.**

We are a work center certified under Wis. Stats. S. 16.752 employing persons with severe disabilities. Questions concerning the certification process should be addressed to the Work Center Program, State Bureau of Procurement, 6th Floor, 101 E. Wilson St., Madison, WI 53703, (608) 266-5462.

Section 7: Bidder Certifications

Wis. Stats. s. 16.754 directs the state to purchase materials which are manufactured to the greatest extent in the United States when all other factors are equal. Materials covered in our bid were manufactured in whole or in substantial part in the United States. Yes No Unknown

We certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition, that no attempt has been made to induce any other person or firm to submit or not to submit a bid, that this bid has been independently arrived at without collusion with any other bidder, competitor or potential competitor; that this bid has not been knowingly disclosed prior to the opening of bids to any other bidder or competitor; that the above statement is accurate under penalty of perjury.

We certify that we are not currently engaged in a prohibited boycott of the State of Israel as defined in s. 20.931(1)(b). Should we be awarded a contract, we understand that future engagement in a boycott of the State of Israel may result in contract termination.

We certify that we are in compliance with applicable State of Wisconsin non-discrimination/affirmative action requirements as described in State Standard Terms and Conditions, form DOA-3054.

We will comply with all terms, conditions and specifications required by the state in this Request for Bid/Proposal and all terms of our bid.

Section 8: Bidder Signature

Name of Authorized Company Representative: Lisa Dabkowski	Title: Director	Phone: (203) 404-4835	Fax: (203) 404-4837
Signature of Above 	Date: 1/23/20	Email: slate-proposals@technolutions.com	

Attachment C

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DIVISION OF ENTERPRISE OPERATIONS
BUREAU OF PROCUREMENT
S. 16.765, WIS. STATS.
DOA-3477 (R02/15)

Bid / Proposal # UN-J-0004

Commodity / Service CRM Software

Vendor Information

1. BIDDING / PROPOSING COMPANY NAME Technolutions, Inc.

Phone (203) 404-4835 Toll Free Phone ()

FAX (203) 404-4837 E-Mail Address slate-proposals@technolutions.com

Address 234 Church Street, 15th Floor

City New Haven State CT Zip + 4 06510
2. Name the person to contact for questions concerning this bid / proposal.

Name Laura Gardner Title Chief of Staff

Phone (203) 404-4872 Toll Free Phone ()

FAX () E-Mail Address lgardner@technolutions.com

Address 234 Church Street, 15th Floor

City New Haven State CT Zip + 4 06510
3. Any vendor awarded over \$50,000 on this contract must submit affirmative action information to the department. Please name the Personnel / Human Resource and Development or other person responsible for affirmative action in the company to contact about this plan.

Name _____ Title _____

Phone () Toll Free Phone ()

FAX () E-Mail Address _____

Address _____

City _____ State _____ Zip + 4 _____
4. Mailing address to which state purchase orders are mailed and person the department may contact concerning orders and billings.

Name Maryann Rose Title Operations Manager

Phone (203) 404-4995 Toll Free Phone ()

FAX () E-Mail Address ap@technolutions.com

Address 234 Church Street, 15th Floor

City New Haven State CT Zip + 4 06510
5. CEO / President Name Alexander Clark

This document can be made available in alternate formats to individuals with disabilities upon request.

Attachment D

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DIVISION OF ENTERPRISE OPERATIONS
DOA-3478 (R06/2013)



STATE BUREAU OF PROCUREMENT
101 E. WILSON ST. / P. O. BOX 7867
MADISON, WI 53707-7886
(608) 266-2605 / FAX (608) 267-0600

Bid / Proposal # UN-J-0004

VENDOR REFERENCE

FOR VENDOR: Technolutions, Inc.

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name University of Wisconsin-Whitewater

Address (include Zip + 4) 800 W. Main Street, Whitewater, WI 53190

Contact Person Jessica Brady Phone No. (262) 472-2136

Email Address bradyj@uww.edu

List Product(s) and/or Service(s) Used: CRM Software

Company Name University of Minnesota Graduate School

Address (include Zip + 4) 101 Pleasant Street SE, Minneapolis, MN 55455

Contact Person Suzan Koroglu Phone No. (612) 625-2306

Email Address korog001@umn.edu

List Product(s) and/or Service(s) Used: CRM Software

Company Name Marquette University Graduate School

Address (include Zip + 4) Milwaukee, WI 53233

Contact Person Katie Ruetz Phone No. 414-288-4880

Email Address katie.ruetz@mu.edu

List Product(s) and/or Service(s) Used: CRM Software

Company Name University of Connecticut Graduate School

Address (include Zip + 4) 438 Whitney Road Extension, Storrs, CT 06269

Contact Person Marie LeBlanc Phone No. (860) 486-0978

Email Address marie.leblanc@uconn.edu

List Product(s) and/or Service(s) Used: CRM Software

Attachment E

State of Wisconsin
 Department of Administration
 Division of Enterprise Operations
 DOA-3333 (R05/2015)



State Bureau of Procurement
 101 East Wilson Street, 6th Floor
 Post Office Box 7867
 Madison, WI 53707-7867
 FAX (608) 267-0600
<http://vendornet.state.wi.us>

Vendor Agreement *Wisconsin's Cooperative Purchasing Service*

Wisconsin statutes (s. 16.73, Wis. Stats.) establish authority to allow Wisconsin municipalities to purchase from state contracts. Participating in the service gives vendors opportunities for additional sales without additional bidding. Municipalities use the service to expedite purchases. A "municipality" is defined as any county, city, village, town, school district, board of school directors, sewer district, drainage district, vocational, technical and adult education district, or any other public body having the authority to award public contracts (s. 16.70(8), Wis. Stats.). Federally recognized Indian tribes and bands in this state may participate in cooperative purchasing with the state or any municipality under ss. 66.0301(1) and (2), Wis.Stats.

Interested municipalities:

- will contact the contractor directly to place orders referencing the state agency contract number; and
- are responsible for receipt, acceptance, inspection of commodities directly from the contractor, and making payment directly to the contractor.

The State of Wisconsin is not a party to these purchases or any dispute arising from these purchases and is not liable for delivery or payment of any of these purchases.

The State of Wisconsin will determine the contractor's participation by checking a box below:

- MANDATORY:** Bidders/Proposers must agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities. Vendors should note any special conditions below.
- OPTIONAL:** Bidders/Proposers may or may not agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities. A vendor's decision on participating in this service has no effect on awarding this contract.

A vendor in the service may specify minimum order sizes by volume or dollar amount, additional charges beyond normal delivery areas, or other minimal changes for municipalities.

Vendor: please check one of the following boxes in response.

- I Agree to furnish the commodities or services of this bid/proposal to Wisconsin municipalities with any special conditions noted below.
- I Do Not Agree to furnish the commodities or services to Wisconsin municipalities.

Special Conditions (if applicable):			
Signature 		Date (mm/dd/ccyy) 1/23/20	
Name (Type or Print) Lisa Dabkowski		Title Director	
Company Technolutions		Telephone (203) 404-4835	
Address (Street) 234 Church Street, 15th Floor	City New Haven	State CT	ZIP + 4 06510
Commodity/Service CRM Software		Request for Bid/Proposal Number UN-J-0004	

This document can be made available in alternate formats to individuals with disabilities upon request.

SECTION 6: RFP CHECKLIST AND SUBMITTAL PAGE

NOTE: This form must be returned with your proposal. Numbers for each question below refer to the corresponding section of this document that explains the requirement. Proposer may attach additional relevant information to their proposal response; identify sections to which information applies.

6.1 Proposer has reviewed and agrees to all terms and conditions in sections, subsections and included paragraphs:

	YES	NO
3.1 Entire Contract	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.2 Cloud Computing and Storage Specific Terms and Conditions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.3 Contract Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.4 Term of Contract	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.5 Contract Termination	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.6 Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.7 Firm Prices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.8 Payment Terms	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.9 Invoicing Requirements	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.10 On-Site Service	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.11 Requirements for Criminal Background Checks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.12 Employee Identification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.13 Travel Per Diems	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.14 Campus Delivery Requirements	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.15 Acceptance and Testing (Post-Award)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.16 Insurance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.17 Activity Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.18 Record and Audit	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.19 Performance Meetings	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.20 Service Requirements	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.21 Subcontracting	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.22 Fair Price Analysis	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.23 Data Security and Confidentiality	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.24 Severability	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.25 Environmentally Responsible ("Green") Product	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.26 Energy Star	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.27 Supplier Diversity	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.28 Debarment	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.29 Waiver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.30 Amendments	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.31 Adverse Interests	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.32 Assignment	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.33 Confidentiality	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.34 Promotional Materials/Endorsements	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.35 Electronic Commerce/Online Ordering	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.36 Additional Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.37 Incident Reporting	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6.2 Proposer has responded to all items in Section #4, "Requirements and Specifications of All RFPs".
 _____ (Initial)

6.3 Proposer has completed all the required attachment forms.

YES NO

6.4 Proposer agrees to the State of Wisconsin Terms and Conditions (Attachment F) and State of Wisconsin Supplemental Terms and Conditions (Attachment G).

YES NO

6.5 MBE Participation: With this procurement, the Proposer is encouraged to purchase services and supplies from Minority Business Enterprises (MBEs) that are certified by the State of Wisconsin, Department of Commerce, Bureau of Minority Business Development. UW-Whitewater may require the Service Provider to meet with the University to identify MBE Subcontractors for the provision of services for this Contract. A list of Certified MBEs and the services and commodities that they provide is available from the RFP Manager. The list is also published on the internet at: <https://doa.wi.gov/Pages/DoingBusiness/SupplierDiversity.aspx>. For more information, call (608) 267-9550.

6.6 In preparing this RFP, this Proposer has not been assisted by any current or former employee of the State of Wisconsin whose duties relate to this RFP and who was assisting in other than his or her official capacity. Neither does such a person or any member of his or her immediate family have any financial interest in the outcome of this RFP. LD (Initial)

6.7 **CONTRACT ADMINISTRATOR:**

The contract resulting from this RFP will be administered by the UNIVERSITY OF WISCONSIN WHITEWATER through the Vice Chancellor of Financial Services and/or designated contract administrator. The contract administrator may assign a person to be responsible for day-to-day operations, support, and contract compliance.

Any correspondence, price lists or other documents must include reference to RFP number **UN-J-0004** and be sent to Ryan Moore, 800 West Main Street, WHITEWATER, WI, 53190. UW WHITEWATER Financial Services is authorized to give the approvals required under this contract on behalf of the University.

The Proposer certifies by submission of the RFP that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency. LD (Initial)

In signing this RFP, we have read and fully understand and agree to all terms, conditions and specifications and acknowledge that the Budget, Planning and Analysis/Purchasing Department RFP document on file shall be controlling. We certify that we have not, either directly or indirectly, entered into any Contract or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a RFP; that this RFP has been independently arrived at without collusion with any other Proposal submitter, competitor or potential competitor; that this RFP has not been knowingly disclosed prior to the opening of RFPs to any other Proposal submitter or competitor; that the stated statement is accurate under penalty of perjury.

Lisa Dabkowski, Director

Name and Title of Signing Officer (print)

Technolutions, 234 Church Street, 15th Floor, New Haven, CT 06510

Company Name and Address

(203) 404-4835

Telephone

(203) 404-4837

Fax Number

20-1751009

Tax I.D. Number

Lisa Dabkowski

Signature

1/23/20

Date

SECTION #3: TERMS AND CONDITIONS OF CONTRACT

3.1 Entire Contract

A contract will be awarded based on the criteria established in this Request for Proposal, including attachments and any amendments issued. The RFP, the proposal response, and written communications incorporated into the contract constitute the entire contract between the parties. The hierarchy of documents in descending order for resolution is as follows:

- A. Contract Award Letter
- B. Original Request for Proposal Number **UN-J-0004**, dated **January 8, 2020**, including amendments/ attachments
- C. Proposer response to RFP.
- D. Official Purchase Order (when applicable)

Any other terms and conditions provided by the Proposer with the proposal or for future transactions against this contract, including but not limited to click on agreements accepted by the Customer; shrink wrapped agreements; or terms submitted with quotations, order acknowledgements, or invoices; will be considered null and void and will not be enforceable by the Contractor unless agreed to in a written amendment signed by the University Budget, Planning and Analysis/Purchasing Department. Any exceptions to this RFP should be submitted with your response and alternative language proposed. **(Deviations and exceptions from original text, terms, conditions, or specifications shall be described fully, on the bidder's/proposer's letterhead, signed, and attached to the proposal response as an attachment. Each deviation and exception must be identified by the section, page and paragraph to which it applies. In the absence of such statement, the bid/proposal shall be accepted as in strict compliance with all terms, conditions, and specifications and the bidder/proposer shall be held liable.)**

Submitting a standard Proposer contract or term and condition as a complete substitute or alternative for the language in this solicitation will not be accepted and may result in rejection of the proposal.

The University reserves the right to negotiate contractual terms and conditions or reject the Proposer's response and proceed to the next qualified proposer.

3.2 Cloud Computing and Storage Specific Terms and Conditions

Additional Terms and Conditions of the contract are included in this RFP. At a minimum, Service requirements presented in Section 4, Requirements and Specifications, shall be part of any contract. Proposers must provide copies of standard Contracts or Service Level Agreements (SLA) for each service being offered to the University. NOTE: As an agency of the State of Wisconsin, state law does not allow the University to legally agree to the wording in clauses contained in many standard cloud computing SLA's and or terms of service in the areas of indemnification, governing law, jurisdiction and venue of another state's courts, and binding arbitration. You must be prepared to negotiate changes in your standard SLA/TOS in these areas. See Attachment F, Standard Terms and Conditions and Attachment G, Supplemental Standard Terms and Conditions.

3.3 Contract Administrator

- A. Any correspondence must include reference to RFP number UN-J-0004 and be sent to the Contractor Administrator. The Contract Administrators are authorized to give the approval required under this contract on behalf of the University.

The Contract Administrator for the University is:

Ryan Moore
The UNIVERSITY OF WISCONSIN WHITEWATER
Budget, Planning and Analysis/Purchasing Office
Hyer Hall Room 139
800 West Main Street
WHITEWATER, Wisconsin 53190
Phone: 262.472.1633
Email: moorer@uww.edu

- B. The Contractor's Contract Administrator who can act with full authority on the Contractor's behalf in all matters pertaining to the Contractor's company.

Day- to-day operations will be handled by:

Lisa Dabkowski (Name)
Technolutions (Company)
234 Church Street, 15th Floor (Address)
New Haven, CT 06510 (Address)
PHONE (203) 404-4835 -- FAX (203) 404-4837
EMAIL slate-proposals@technolutions.com

3.4 Term of Contract

It is the intent of the University to start the resulting Contract upon successful negotiations. The contract shall be effective on the contract execution date and shall run for 1 year from that date, with an option to renew for 4 additional 1-year periods.

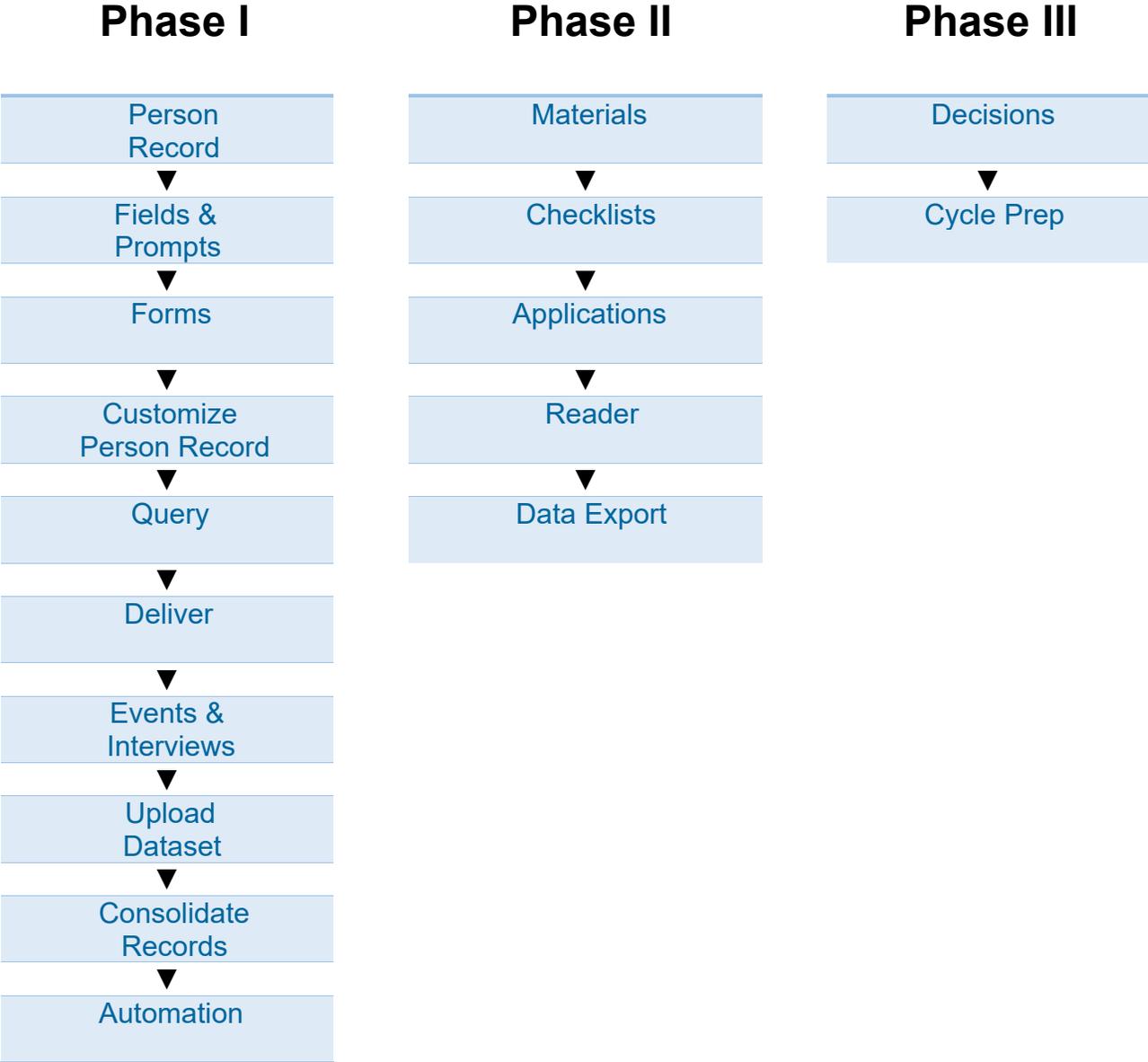
This contract shall automatically be extended into its second, third, fourth and fifth years unless the Contract Administrator is notified in writing by the Contractor; or the Contractor is notified by the Contract Administrator in writing 90 calendar days prior to expiration of the initial and/or succeeding contract term(s).

3.5 Contract Termination

- 3.5.1 The University may terminate the Contract at any time, without cause, by providing 90 days written notice to the Contractor. If the Contract is so terminated, the University is liable only for payments for products provided or services performed, to the extent that any actual direct costs have been incurred by the Contractor pursuant to fulfilling the contract. The University will be obligated to pay such expenses up to the date of the termination.
- 3.5.2 Shall either party **fail to perform** under the terms of this Contract; the aggrieved party may notify the other party in writing of such failure and demand that the same be remedied within 30 calendar days. Should the defaulting party fail to remedy the same within said period, the other party shall then have the right to terminate this Contract **immediately**. Performance failure can be defined as failure to provide any of the terms, conditions, or specifications within this RFP.
- 3.5.3 Failure to maintain a minimum of 98% operability 24 hours a day, seven days a week.
- 3.5.4 If at any time the Contractor performance **threatens the health and/or safety** of the University, its staff, students or others who may be on campus, the University has the right to cancel and terminate the Contract without notice.
- 3.5.5 Failure to maintain the required Certificates of Insurance, Permits and Licenses shall be cause for Contract termination. If the Contractor fails to maintain and keep in force the insurance as provided in Standard Terms and Conditions (attachment F), Section 23.0, the University has the right to cancel and terminate the Contract without notice.
- 3.5.6 If at any time a petition in **bankruptcy** shall be filed against the Contractor and such petition is not dismissed within 90 calendar days, or if a receiver or trustee of Contractor's property is appointed and such appointment is not vacated within 90 calendar days, the University has the right, in addition to any other rights of whatsoever nature that it may have at law or in equity, to terminate this contract by giving 10 calendar days' notice in writing of such termination.
- 3.5.7 All notices of performance failure must be submitted in writing to Budget, Planning and Analysis/Purchasing Department, HYER HALL ROOM 139, 800 WEST MAIN STREET, WHITEWATER, WI 53190. The Budget, Planning and Analysis/Purchasing Department shall be final authority for all performance failure determinations not resolved through the Admissions Office.

The Roadmap

The Roadmap has been developed over the course of more than 1,100 implementations to help guide Slate users. It follows the progression of the admission cycle to help learn fundamental Slate skills in the order in which they will need them. Certain core skills, such as building forms, are used throughout the Roadmap to achieve functional goals. As a best practice, follow the Roadmap as closely as possible when implementing and training new users in Slate.



Slate by Technolutions

Executive Summary

Over 1,100 partner colleges and universities trust Slate by Technolutions to manage their student lifecycle and application management needs. Slate is the preeminent solution for institutions for recruiting students and donors, providing the best combination of qualified services, value for money, and experience.

Technolutions has served the education industry for more than two decades and has maintained 100% client retention. This is unparalleled within the field and reflects the unrivaled quality of product and service provided.

Technolutions partners with colleges and universities worldwide, including:

- 46 of top 50 *U.S. News & World Report* National Universities Rankings
- 46 of top 50 *U.S. News & World Report* National Liberal Arts Colleges Rankings
- The majority of top 25 *Businessweek* business schools
- 39 of the 43 Colleges That Change Lives
- Seven of the Big Ten Academic Alliance
- 51 of the 62 Association of American Universities member institutions
- 24 of the 27 Association of Jesuit Colleges & Universities member institutions
- The majority of Common Application member institutions
- The majority of Coalition Application member institutions
- Over 1,100 colleges, universities, independent schools, and foundations worldwide

The feature set is unrivaled:

- Comprehensive CRM for the entire student lifecycle
 - Recruitment and outreach from prospect to applicant to enrolled student
 - Student success and advising tools included in all Slate databases
 - Unlimited emails to all audiences including current students at no extra cost
 - Manage events and communications to alumni, donors, and more
 - Schedule visits and connect with high schools and CBOs through Slate.org
- Outreach and Marketing
 - Email and SMS mail-merge communications delivery
 - Drip marketing campaigns
 - Inbox management for shared mailbox and communications tracking
 - Data visualization tools to identify prospects
 - Printing collateral platform
- Events and Travel Scheduling
 - Event registration and automated communications
 - Interview scheduling, video essays, and video interviewing
 - Travel and expense management
- Communication
 - Live webinars with slide sharing, audio, video, and chat
 - AI chatbots powered by your institutional FAQs
 - Telephony service

- Reporting and Data
 - Graphical query, dashboard, and report builders
 - Predictive modeling using machine-learning algorithms
 - Integrated analytics and user-identifiable website tracking

- Student Applications and Forms
 - Customizable online applications
 - Applicant status portals
 - Online reading and review, including review form submission
 - Customizable workflows
 - Support for all major search lists, score data files, and data vendors
 - Financial aid tracking and integration
 - Custom constituency portals
 - Online payments for application fees, enrollment deposits, and event payments
 - Form building and data capture

- Data Management
 - Document management and digital imaging
 - Digital portfolios, media conversion, and media hosting
 - Real-time web services and data feeds
 - Integrated data transformation systems for imports and exports
 - Robust data deduplication
 - Dataset storage of organizations, contacts, alumni, etc.
 - Integration with all major information systems and ERPs, including homegrown

The service and support are unrivaled:

- Unlimited access to development and engineering resources
- Integrated service and support resources
- Bi-weekly Launchpad training for onboarding institutions or new users
- Launchpad 200 trainings on specialized topics offered throughout the year and across the country
- User-led regional gatherings held around the country throughout the year for networking and sharing of ideas
- Vibrant user community forums and annual user conference attended by over 3,000 participants

The security and scalability are unrivaled:

- Integrated GDPR compliance tools
- 99.999% availability for the past 5 years amounting to less than 5 minutes of total downtime, including scheduled maintenance, during a calendar year
- No security breaches or major outages ever
- Simultaneous decision releases for hundreds of thousands of applicants with no increased latency or service degradation or interruption
- Over 2 billion email messages sent every year
- Each institution housed within its own private database, and data is never comingled
- All data hosted within the United States (or Canada or Europe as required) and fully encrypted in transit and at rest

- Direct integration with institutional single sign-on such as SAML/Shibboleth, CAS, etc.
- Support for multi-factor authentication
- Granular field-level and function-level permissions
- Direct SQL access for additional integration
- Capability to push and pull from local and remote SFTP servers

The licensing arrangement is unrivaled:

- Flat-rate and predictable licenses
- No separate costs or limitations per-application, per-support-hour, or per-implementation
- Unlimited emails and users at no extra cost
- Custom-built platform created and supported entirely in-house by Technolutions
 - No separate “apps” required for any functionality, providing consistent data and user experience throughout
- Partners value the efficiencies gained by using Slate:
 - Any customizations may be made by non-IT staff
 - Mobile access available for all end-user and administrative systems
 - Self-service functionality including password resets and document uploads
 - Comprehensive functionality reduces data integrations and ongoing training requirements by centralizing admissions activities in one system

For more information, contact:

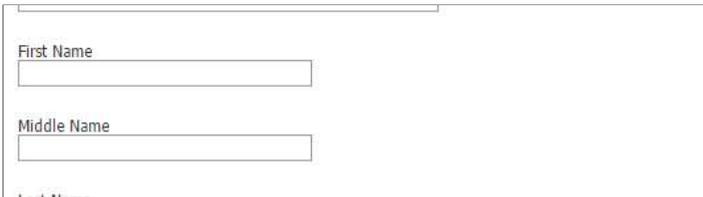
Alexander Clark
Chief Executive Officer
234 Church Street, 15th Floor
New Haven, CT 06510
slate-proposals@technolutions.com
203-404-4835

Technolutions / www.technolutions.com

Technolutions New Haven / 234 Church Street, Floor 15 / New Haven, Connecticut 06510

Technolutions Portland / 1211 SW 5th Avenue, Suite 2800 / Portland, Oregon 97204

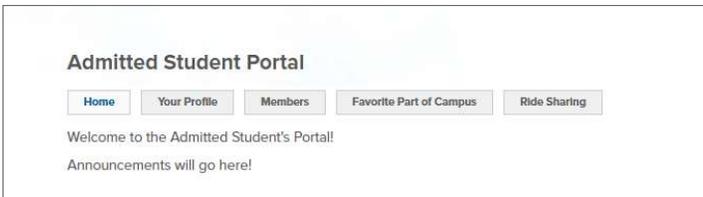
Slate Features—Comprehensive capabilities and limitless possibilities



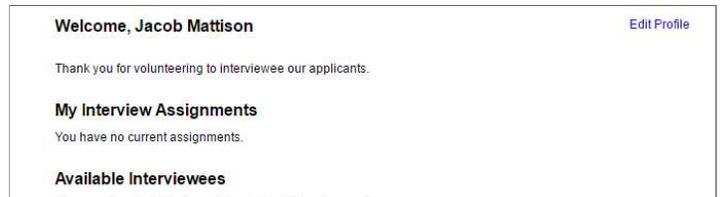
Account Registration Form
Use the Form Builder to customize the Account Registration Form used when students first create their Slate accounts.



Administrative PDF Download
Indicate which materials and create packets of application materials that can be downloaded by Slate users for either specific records or in batch via the Query Builder.



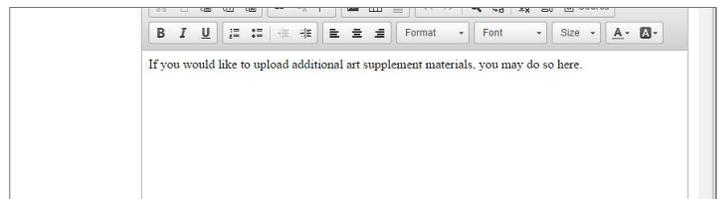
Admitted Student Portal
Add an Admitted Student Portal from the Slate Template Library to allow admitted students to connect and converse prior to enrollment.



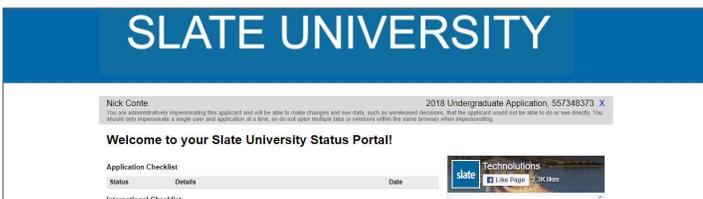
Alumni Interviewing Portal
Add an Alumni Interview Portal from the Slate Template Library to allow alumni volunteers to claim students they'd like to interview and submit a subsequent interview report form.



Alumni Interviewing Portal (Assignment by Captains)
Add an Alumni Interviewing Portal from the Slate Template Library to allow alumni and students to be paired up by a designated regional captain.



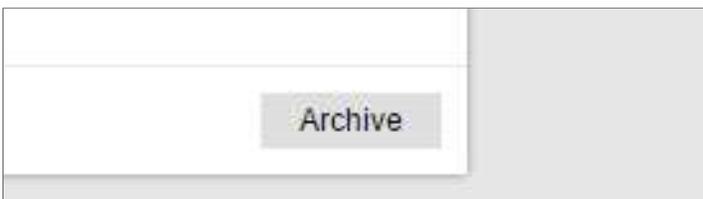
Applicant PDF Download
Allow students to download and preserve a PDF copy of their application prior to submission or on their Status Page.



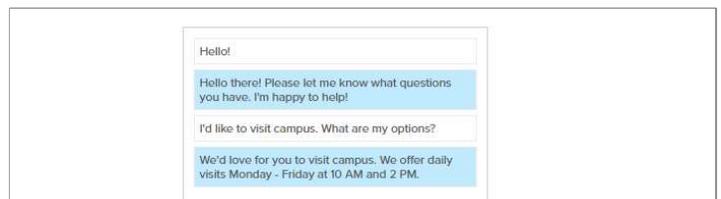
Applicant Status Portal
Slate provides a student portal where all applicants can view updates to their checklist, upload materials including media files, confirm addresses and receive online decision letters.



Application Creation Form
Use the Form Builder to design a single form used in the creation of an application. This is a simplified alternative to the full Slate Application.



Archive
Archive any queries, reports, forms, voyages, deliver campaigns, etc. to hide them from Slate users without fully deleting them or losing any associated data.



Artificial Intelligence Chatbots
Configure AI Chatbots to dynamically respond to questions asked utilizing natural language processing. To jump-start the configuration of AI Chatbots, FAQ pages can be automatically imported to generate answers for questions posed to the bot.

Slate Features—Comprehensive capabilities and limitless possibilities

Athletics Portal

You are logged in as Technolutions Service Desk. [Logout](#)

You are a coach for:



Here are some varsity athletes in your sports:

Name	Sport	Rating	App Round	Status	Decision

Athletics Portal

Add an Athletics Portal from the Slate Template Library to allow coaches to view students on their team, see their application status, view missing application materials, and more.

The following ID may be shared and used to add this object, as it exists at this moment in time, to any other database.

7a6adcbd-9c68-a22f-8da0-55be22b7ec15

Briefcase

Easily move certain objects from one database to another via the Briefcase import tool. Perhaps a form created in the test environment is ready to move to production, or a useful query should be copied from an institution's undergraduate database to their graduate database. With permission, objects may also be shared from one partner institution's database to another.

History

Date	Records
09/07/2017 05:57:18 PM	5
08/18/2017 01:11:11 PM	5

Current for Technolutions Service Desk

First	Last	Device	Primary Phone #1
Amy	Allen	+1 555-292-9075	
Stella	Allen	+1 555-189-6644	
Zane	Allen	+1 555-892-5902	
Aaron	Anderson	+1 555-628-6482	
Maddox	Anderson	+1 555-432-0916	

Call Lists

Telerecruiting is important, and Slate makes it easy through combining the benefits of both Queries and the Form Builder. Pull call lists via the Query tool - complete with pertinent person data - and submit a form recording notes from each call.

Slate supports the self-service provisioning of a Clean Slate environment that may be used whenever such an environment would be useful.

Database	slate-demo
Organization	Slate Demo
Endpoint	https://slate-demo-model.test.technolutions.net/manage/
Status	Expired
Lease Start	06/14/2017
Lease Termination	Non-expiring if use remains active (at least one login every 30 days)
Authorizing User	Technolutions Service Desk
Initial Administrators	<input checked="" type="checkbox"/> Admin, Demo (demoadmin) <input type="checkbox"/> Counselor, International (intl) <input type="checkbox"/> Service, Remote (remoteservice) <input checked="" type="checkbox"/> Barris, Matthew (mbarris) <input type="checkbox"/> Counselor, Northeast (northeast) <input type="checkbox"/> Service, Remote (remoteservice-slate-demo.technolutions.net) <input type="checkbox"/> Clark, Alexander (agclark) <input type="checkbox"/> Counselor, Test (testy) <input type="checkbox"/> Test, Zandeeck (zandeecktest) <input type="checkbox"/> CommonApp, Demo (democa) <input type="checkbox"/> MCTesterson, Testy (techmct)

Clean Slate

Provision a separate copy of your Slate Database that is as clean and empty as it was on your first day of implementation.

Cluster Report

Round	Name	Application Status	Bin	Sex	Race	GPA	GPA Scale
2017 Regular	Baker, Katherine	Awaiting Decision	Awaiting	F			
2017 Regular	Franklin, Gloria	Awaiting Decision	Awaiting	F			
2017 Regular	Gilbert, Juan	Awaiting Decision	Awaiting	M			
2017 Regular	Grant, Jerry	Awaiting Decision	Awaiting	M			
2017 Regular	Hill, Raymond	Awaiting Decision	Awaiting	M			
2017 Regular	Hunter, Carolyn	Awaiting Decision	Awaiting	F			
2017 Regular	Jordan, Walter	Awaiting Decision	Awaiting	M			
2017 Regular	Myers, Melissa	Awaiting Decision	Awaiting	F			

Cluster Report

Cluster Report allows for the comparison of applications who meet similar criteria (e.g. students attending the same school or similar program).

ter NOT (OR)

d:Extra_Interests IN Dance

Conditional Logic

Conditional logic allows you to show or hide entire pages, whole sections, specific questions, or discrete values based on other known information about the record.

Congratulations on your admission to State University. [Reply to Offer of Admission](#)

>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent eu quam tempor ante interdum dignissim in et ante. In vel blandit urna. Donec vestibulum porta nisi, non lacina erat tristique sed. Curabitur odio justo, fringilla aliquet dolor vitae, tempus luctus digni. Morbi interdum eros vel dolor nuptiate placerat. Sed trincidunt sieneed trissu egestas, ac lobortis massa viverra. Phasellus iaculis tempus semper. Maecenas m... mi eu arcu porta tempor. Aenean nisi sapien, mattis id trincidunt eu, maximus et leo. Integer odio lectus, viverra a hendrerit pellentesque, molestie ut nisi. Phasellus s... luctus du, id egestas lorem ultrices quis. Nullam et elit nisi. Ut gravida, arcu vitae mollis sollicitudin, iaculis urna eleifend nunc, et maximus lectus est qui. Igu... purus sit amet metus scutum scelerisque. Mauris euismod enim at odio lobortis facilisis. In nisi lectus, tempus sit amet pellentesque a, porta nec metus.

Fusce vehicula ultrices nulla, quis accumsan tortor suscipit eget. Aenean dignissim ligula libero. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed eu ante diam. Morbi gravida asper bellus in vestibulum. Ut porta ultrices lorem sed magna. Curabitur sed velit vel enim malesuada laoreet. Et eget mauris. Phasellus mollis lobortis congue. Vestibulum id massa ut odio fringilla ornare sit amet ut massa. Vivamus... et convallis enim cursus cursus non tempus d... Cras sodales rhoncus du, a pretium diam lobortis at. Sed facilisis porta ipsum vel aliquet enim venenatis at. Phasellus dictum commodo metus at consequat. Phasellus vitae est sit amet felis sodales lacquid id at nunc. Suspendisse fringilla tellus vel elit posuere, id efficitur purus fringilla. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut portitor nisi et libero gravida blandit. Proin ultrices ligula eu lorem dignissim, ac vulputate orci fimbis. Curabitur et lorem aliquet, egestas purus vel, auctor massa. Vestibulum pretium euismod mauris at return.

Confetti in Admit Decision Letters

Add a little pizzazz to your admit decision letters by including animated confetti that can even be in your school colors! You can also use images in a snowfall effect to show your school pride.

Groups Joins

Joins

Person

Address by Rank Overall	Address by Type, Rank	Application by Rank
Application by Rank Submitted	Course by School Level of Study, Course Ra...	Device by Type, Rank
Interest by Rank	Job by Rank	Relation by Type Category, Category Rank
School by Level of Study, Rank	School by Rank Overall	Sport by Rank Overall

Configurable Joins

Configurable Joins offers extended capabilities for data extraction by providing access to more tables in the database, as well as greater flexibility in query building with subqueries.



Confirmation Page Redirect

When submitting a form in Slate, it automatically redirects to a standard or custom confirmation page. However, if it is preferable to redirect the form submitter to a different website entirely, this functionality allows a new destination to be specified.

Consolidate Records

[Overview](#)

Persons

- Address + Partial(First + Last) (4)
- Email (34)
- Nickname + Last + Email (6)

Relationships

- First + Last + Type (1)

[Recently Merged](#)

Consolidate Records

Slate provides a powerful system for identifying and consolidating duplicate records. Use Consolidate Records to evaluate and merge duplicates.

Slate Features—Comprehensive capabilities and limitless possibilities

Counselor Portal

Name: Test Counselor
 School: Claremont McKenna College
 Email: counselor@school.edu
 CEEB Code: 4154
 Profile: [Edit Profile](#)

These students have started applications from your school. Click onto any applicant to view additional details.

Name	Round	Status	Decision
Burris (Williams), Matthew Nicholas Jr. (Matt)	2016 Regular Decision	Decided	Withdraw
Burris (Williams), Matthew Nicholas Jr. (Matt)	2017 Regular Decision	Awaiting Decision	
Gall, Dance	2016 Regular Decision	Decided	Deny

Counselor Portal
 Add a Counselor Portal from the Slate Template Library to allow organization contacts of counselors to view student's from their school, alongside missing documents and recent decisions.

to start classes at Slate University?

Which degree interests you?
 Masters

Which program interests you most?
 Engineering

Additional Information
 Mechanical Engineering
 Nautical Studies
 Marine Archaeology
 Oceanography and Coastal Sciences
 Nutritional Studies

How did you hear about us?

Custom Application Pages
 Use the Form Builder to design custom pages to collect data in the Slate application.

Received	Academic Scholarship Essay	06/12/2016
Waived	Recommendation from Test D, Hermon High School Sent to recommender on 06/05/2017.	06/21/2017
Received	ACT Score Report	04/14/2014
Received	AP Score Report Test Date: 1/2012	08/05/2015
Received	SAT R Score Report Test Date: 1/2011	06/04/2015
Waived	TOEFL Score Report Test Date: 1/2016	10/13/2015

Custom Checklist Sections
 Add custom checklist sections to separate admissions, financial aid, scholarship, and post-matriculation checklist requirements, among any other categories that may be desired.

Custom Person Tab

Entry Term: 2017
 Hispanic or Latino?: No
 Race: White
 Parent Email: lily@potters.com
 Military Vet: No
 Country of Birth: United Kingdom

Custom Form Tabs
 Add custom tabs to the person or application record to allow for easy access to review and change information. Customize the display of data using Form Builder features such as conditional logic, HTML content, and multi-column formatting.

Custom Permissions

Name	Status
New Custom Permission	
English Faculty	
Faculty Scholarship Reviewers	
Graduate Admissions Readers	
Program Permissions	
Student Workers	
Undergrad Readers	

Custom Permissions
 Sometimes it may be necessary to restrict access to certain areas and features of Slate. Custom permissions allows you to go beyond standard Slate functionality to precisely limit access as necessary.

Please rate the applicant in the following areas. *

	Below Average	Average	Good	Excellent	One of the Best!
Academic Potential	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Leadership Potential	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Community Involvement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please comment on the applicant's integrity. *

This applicant displays below average integrity.

This applicant displays average integrity.

This applicant displays above average integrity.

This applicant displays excellent integrity.

Custom Reference Page Forms
 Create a custom recommendation form using the Form Builder that can be sent to a recommender electronically by an applicant via the Slate application.

Records

Search Database

Recent

- Alexander, Olivia
- Maisie
- Skyline High School
- Hunter, Aiden Richard
- Denver Scholarship Foundation
- Smith, Hannah
- Issaquah High School
- Lily Potter
- Albus Dumbledore
- Raimier Scholars
- Nathan Green

Dataset Icons
 Customize the icons in Lookup for your datasets, allowing for easy differentiation of records.

Volunteers

Search...

Matched Rows: 3

Filter: Filter NOT (OR)

Name	Email	Type
Jones, Lily	test@test.com	Parent
Volunteer, Matt	volunteer@university.edu	Parent

Datasets
 Oftentimes institutions may want to capture information and create records for additional constituencies within a database; for example, alumni volunteers, organizations, churches, counselors, and more. Datasets make this possible by allowing for information to be stored in Slate as individual records related to one another.

Decision Letter Templates
 Create HTML letters associated with specific decision codes for display on the Status Page.

Dear {{preferred}},

Congratulations on your admission to Slate University. [Reply to Offer of Admission](#)

[[{code}]]

[[{name}]]

[[{email}]]

[[{phone}]]

[[{address}]]

[[{city}]]

[[{state}]]

[[{zip}]]

[[{country}]]

[[{school}]]

[[{program}]]

[[{reason}]]

[[{street}]]

[[{city}]]

[[{state}]]

[[{zip}]]

[[{phone}]]

[[{email}]]

[[{code}]]

Decision Reasons
 Track why a student was given a particular decision.

Reason	Export
Admitted in RD	
Admitted in Special Program	SP
Admitted in EA	EA
Waiting additional test scores	

Slate Features—Comprehensive capabilities and limitless possibilities



Decision Release Population Permissions

Easily restrict the ability to assign and release decisions for Slate users with specific populations. For example, only allow the Psychology department to release decisions to applicants to the Psychology program.



Default Column Headers

Customize the default column headers that appear throughout the Reader. For example, include the applicant's current institution, GPA, and date of application submission.



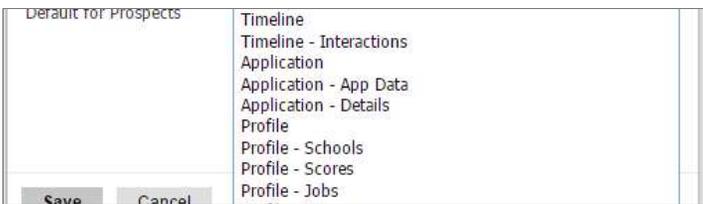
Default Column Headers by Bin

Determine column headers that list applications in the Reader by bin. For example, show one set of columns to first readers and a different set of columns to committee members.



Default Query Template

Often when querying, it's necessary to include the same key data points and filter criteria. Instead of manually adding these each time, define a template query that will pre-populate the data points and filters when building a new query.



Default Tab of Person Record

When first navigating to a person record, users can select which tab should be the default.



Deletion Log

Everybody makes mistakes. When a record or object is deleted throughout Slate, we instantly capture the details of that deletion including the who, what, and when in the Deletion Log. Even better, easily restore something that has been accidentally deleted with the click of a button.



Deliver Conditional Logic

Add conditional content to your Deliver mailings using simple if/then logic. Select which text and/or images you wish to display conditionally, and apply filter conditions to determine when (and for which recipients) that content should appear.



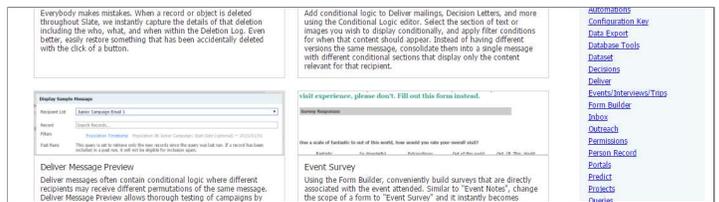
Display Sample Message

When building an email, SMS message, or other content in Deliver, use "Display Sample Message" to preview the look of the message for any possible recipient. Especially useful when building messages that contain conditional logic, this tool allows every iteration of a message to be tested.



Deliver Statistics

Compile aggregate statistics within Deliver related to the unique opens and click rates of particular messages.



Discovery

Discover what Slate has to offer. With new features being released year-round, it's easy to miss something. In one easily searchable place you can discover what is new, what you have yet to try, and what features may maximize your Slate implementation. Check back often as new features are always being added!

Slate Features—Comprehensive capabilities and limitless possibilities

Email Domain:

Lookup

Domain: test.edu

DKIM Configuration

Utilize DKIM (DomainKeys Identified Mail) configuration to authenticate email sent from Slate, which allows email servers to recognize that an email is from the institution and not from a spam account.

FR Encourage Visit
Entry Term: IN 2018
Event Registration Count by Template, Status (Person-Scoped) < 1IN Daily Visit Template, Tour Template NOT IN Registered, Attended > - Prospect Status: IN Inquiry

Statistics Show

Mailings

+1 **Visit 1** In Progress

Population Timestamp Days: IN Visit; = 1

Drip Marketing

Drip marketing campaigns allow for an automated, consistent way to reach out to particular populations defined by your institution to cater to their needs and interests.

Duolingo Integration

Duolingo English Test scores and video endpoints can be imported into Slate, which can then be embedded inside of the Reader.

Email

Email is an integral piece of the recruitment process, and with Slate's Deliver module, it's even easier to send those important messages. Create campaigns, configure standalone emails, track analytics, and simplify the email messaging process.

Ping enables you to track remote user access across institutional web properties outside of Slate and correlate those accesses with records in Slate. Ping data is aggregated periodically every hour, and Ping access is matched to Slate records every night. To enable Ping tracking on a website, add the following snippet of JavaScript to the HTML source of your webpage or template.

```
<script async src="https://slate-partners.technolutions.net/ping"></script>
```

Statistics

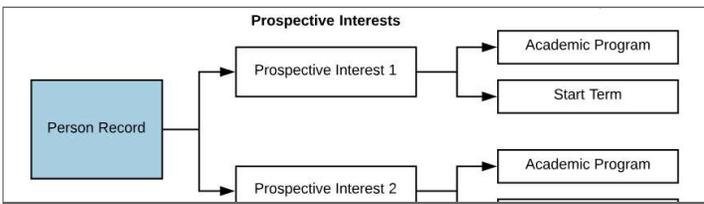
Year	Inquiries	Applicants	Admits
2018	5	0	0
2017	0	13	11
2016	0	20	15

Embed Ping on Slate Pages

In addition to embedding the Ping tracking code on institutional websites, Ping can be automatically embedded within all Slate pages allowing tracking without the need for authentication.

Embed Queries within Dataset Records

When it comes to datasets, it can be helpful to know how your prospects are interacting with individual dataset records. Slate allows for embedded queries on dataset records, making it possible for related data to be front and center. For example, on a high school's dataset record, utilize an embedded query to show applicant data of students from that high school who applied to your institution within the last admission cycle.



Sender: "Slate Playground" <service-desk@technolutions.com>
Recipient: {{sys-email}}
Subject: Thanks for your interest - your campus visit to Slate University has been scheduled
Edit Mailing

Sent: 16 Delivered: 16 (100.0%) Unique Opens: 4 (25.0%) Unique Clicks: 1 (6.3%) Bounces: 0 (0.0%)

Check In

Trigger: Upon registration or update
Group: Email + Confirmation Page
Status: Active

Entities

Create custom objects and subsequent one-to-many relationships, such as scholarships or prospective academic interests, using Entities.

Event Communications

Create a custom event communications package based on a variety of event-related triggers.

New Mailing

Name:

Trigger: **Upon registration or update**

Group:

Status:

Method:

UTM Tracking:

Attach iCal:

Hide from Timeline:

Register for a Campus Visit

Monday, February 15, 2016

- Campus Visit: Monday, February 15 at 10:00 AM
- Campus Visit: Monday, February 15 at 12:00 PM
- Campus Visit: Monday, February 15 at 4:00 PM

Legend:
 Available
 Unavailable / Filled
 Not Scheduled

Event Invitations & RSVP

Event invitation mailings can be configured via Deliver as an Outreach Mailing. Once an Outreach Mailing is associated with an event, an Outreach tab is visible on the event page. Recipients of the Outreach Mailing can RSVP yes or no, and this response is recorded within the Outreach tab of the event.

Event Landing Pages

Create a landing page to display all or a particular subset of events in either map, list, or calendar format.

Slate Features—Comprehensive capabilities and limitless possibilities

One a scale of fantastic to out of this world, how would you rate your overall visit?

Fantastic So Wonderful Extraordinary Out of this world Out. Of. This. World.

How likely are you to recommend our institution to your friends and family?

Event Surveys

Build surveys directly associated with an event, and send survey links to attendees in event communications. Survey responses are automatically aggregated and available in a dynamically-generated report on the event page.

User: [Technolutions Service Desk](#) New Report

Status: CONFIRMED Survey Responses

Documents: [Edit Documents](#) Create Events

Upcoming Instances	Description	Category	Status
08/30/2017 09:00 AM	Campus Visit - Master	Campus Visit - Master	Confirmed
08/28/2017 09:00 AM	Campus Visit - Master	Campus Visit - Master	Confirmed
08/25/2017 09:00 AM	Campus Visit - Master	Campus Visit - Master	Confirmed

Event Templates

Event templates save you time and effort by allowing you to configure events in bulk from one location. Changes made at the template level will automatically update individual events using the same template.

Friday, August 3, 2018 at 12:00 PM UTC -04:00



Technolutions
234 Church St
New Haven, CT 06510-1804
United States

[Edit Map](#) [Driving Directions](#)

Chance Showers And Thunderstorms / High 86°
A chance of showers and thunderstorms. Partly sunny. High near 86, with temperatures falling to around South wind around 12 mph. Chance of precipitation is 40%.

Mo	Tu	We	Th	Fr	Sa	Su
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25

Event Weather Conditions & Forecasts

Beginning 10 days before an event's start date, weather information will show for all events and slots that have a location. This weather forecast is available within Events and Scheduler, and can be included in Event and Scheduler communications.

Exclude Weekends or Holidays from Calendar Widgets in Forms

Customize date availability on a registration form to prevent date selection based on particular days of the week and holidays.



Status

Hi Friends! Don't forget to register for Slate University's Open House this Saturday, November 18th!

External iCal Integration

Add external iCal feeds into Slate Events and Interviews. Easily add US Holidays, institutional calendars, staff calendars, and more directly into Slate including any free/busy information.

Facebook

Posting to Facebook is even easier with Slate's Deliver module. Sync the appropriate accounts with Slate and configure status updates that post directly to your institution's Facebook.

Application Checklist

Status	Details
Received	Financial Aid Award

Key: First Day of Week (0 = Sunday, 1 = Monday)

Value: 0

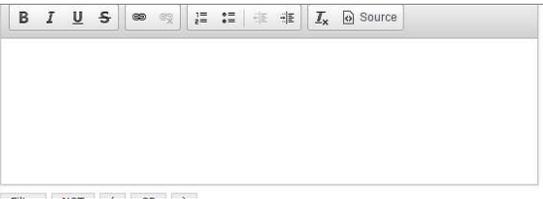
Financial Aid Letter PDF Batch

Batch import financial aid awards automatically into Slate for release on the Status Page.

First Day of the Week

Configure all calendar widgets to begin the week on either a Sunday or a Monday.

Access denied message to be displayed when registrant does NOT meet filter criteria below

B I U S 

System Field:

Export Key:

Data Type:

Size: Width:

Format Mask:

Max Characters:

Max Words:

Form Access Conditions

Restrict access to a form based on conditions specified in filter criteria.

Form Calculation Formulas

Use data inputs within a form to build custom calculations, such as GPA calculations, averages, totals, and more.

Slate Features—Comprehensive capabilities and limitless possibilities

Communications New Mailing

Inquiry Form Response

Trigger: Upon registration or update
 Group: Email - Confirmation Page
 Status: Active
 Sender: "Slate Model" <service-desk@technolutions.com>
 Recipient: {{(sys-email)}}
 Subject: Thank you for your interest in Slate University!

[Edit Mailing](#)

Sent: 7 | Delivered: 7 (100.0%) | Unique Opens: 0 (0.0%) | Unique Clicks: 0 (0.0%) | Bounces: 0 (0.0%)

Form Communications

Build transactional communications based on a form submission, update, or other triggered activities.

Amount Due

Your card will be charged immediately upon clicking Submit. To avoid duplicate charges, do not click Submit more than once. If you are not the primary account holder, please alert him/her to expect this charge.

Payment Details

Method: MasterCard Visa American Express

Form Payments

'Slate Payments' (a payment gateway built into Slate) is fully integrated with the Form Builder making fee collection more transparent and straightforward. Collect event payments and enrollment deposits directly within a single form without the need for separate payment pages.

[Edit Form](#)

Exclusivity Group	#	Type	Status
		Activity	Preview
Admit Reply	1	Decision Reply	Preview
Admit Reply	5	Decision Reply	Preview

Form Rules

Create automated rules that perform actions based on form criteria.

Submission Denied message to be displayed when registrant does NOT meet filter criteria below

B I U S [Rich Text Editor Icons]

Form Submission Conditions

Specify criteria that determines whether or not a record may submit a form.

[https://slate-demo.technolutions.net/register/ campus_visit](https://slate-demo.technolutions.net/register/campus_visit)

Form Vanity URLs

Customize the suffix of a URL for a form or event registration to be more user-friendly and useful in print communications.

Registrants including guests: 4 | Launch Check In | Launch Registration

Search

	State	Guests	Lunch?
ene	OR	0	Yes
dand	OR	2	Yes

Form/Event Custom Field Registration Display

Custom fields can be added to the internal event registration page to be displayed as columns in the form/event registrant list. For example, want to know what state a registrant lives in? Add it as a column to your registration list!

Comments:

What did it feel like? Sunny/Hot Cold/Dreary

Form/Event Notes

Use a custom form associated with an event to record notes such as number of materials used, reminders for next year, cost details, and more.

FAKE

Fraud Report

Slate provides powerful fraud identification and analysis capabilities that can generate fraud reports for specific applications.



Gateway Inbox

Emails received in another system can be forwarded into Slate and matched against existing records.

Attendee Information

Add Attendee 1

First: Harry
Last: Potter

Add Attendee 2

First: Hermione
Last: Granger

Group Registrations

Gather multiple registrations via the submission of a single form, allowing for quick and efficient completion of the registration process for multiple records or event attendees.

Slate Features—Comprehensive capabilities and limitless possibilities

Batch Scan				
Upload PDF from Document Scanner				
Upload PDF from Digital Source				
Print Document Separator				
Refresh Batches				
04/17/2015 09:40:49	Sets: 1	Pages: 18	04/17/2015 at 09:41:42	Continue Scanning
12/07/2016 11:30:55	Sets: 2	Pages: 19	12/07/2016 at 11:31:01	Continue Scanning
Inbound Faxing to +1 860-263-0001	Sets: 1	Pages: 2	06/11/2017 at 10:12:48	Continue Scanning

Inbound Faxing

Documents can be faxed to a local fax number and directly imported into Slate for matching onto person records.

Inbox

Partners using a general, office-wide email account may choose to redirect those emails to Inbox. Inbox allows bi-directional communication directly tied to appropriate person records for both email and SMS messages. Simplify and automate your process using integrated tools such as pre-written responses, auto-replies, message assignment, and material attachment import support.

InitialView Integration

With Slate integration, InitialView interviews can be watched directly from within the Slate Reader with full access to controls offered from within the InitialView platform, allowing users to jump between questions.

User	Doe, Jane
Code	Phone
Subcode	Phone Conversation w/ Student
Timestamp	09/07/2017 05:09:44 PM
Subject	Great conversation!
Private Comments	Had a great conversation with Harry about Slate University today. He's an excellent candidate for admission!

Interaction & Activity Codes

It is important to know how prospects are interacting with your institution. While communications within Slate are automatically captured and tied to the appropriate person record, prospects could be interacting with you outside of Slate as well. Custom interaction codes allow you to track those interactions while also displaying them centrally on the person record.

Interview Ratings	1	2	3	4	5
Interview Preparation	<input type="radio"/>				
Institution Knowledge	<input type="radio"/>				

Interview Report Form

After interviewing a student, associate an interview report form directly with the student's interview slot.

Limit Prompts by Category

With prompt categories, you can organize list prompts within relevant groups, making it quick and easy for a student to select a prompt that is relevant to them.

```
' ' %}{% assign has_stipend = true %}{% type = 'full' %}Since your financial need
```

Liquid Markup

{% if {{Conditionally Displaying Information}} == 'Important' %} then take advantage of Liquid Markup within Deliver campaigns and decision letters. {% endif %}

Mailing Content Snippets

Utilize mailing snippets to conditionally display HTML content within Deliver mailings. Possible use cases for Mailing Snippets include staff signatures, blurbs on academic programs, images related to academic or extracurricular interest, and more.

View	view://testing
Notification	No notifications
Requested Delivery Window (Eastern Time)	<input type="checkbox"/> Overnight: 2:00am-4:00am (preferred window) <input type="checkbox"/> Morning: 10:00am-12:00pm <input type="checkbox"/> Midday: 12:00pm-2:00pm <input type="checkbox"/> Afternoon: 2:00pm-4:00pm <input type="checkbox"/> Evening: 8:00pm-10:00pm
Requested Weekdays	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday

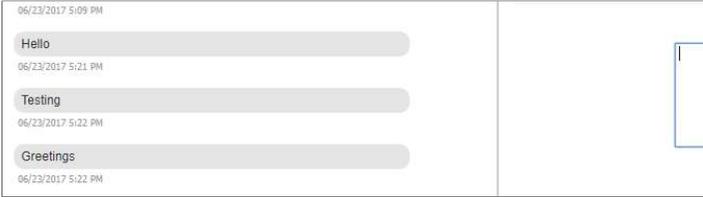
Materialized Views

Materialized views are database objects that store the results of a query. They can be used like normal views, but they are much more efficient because the query results have been pre-generated.

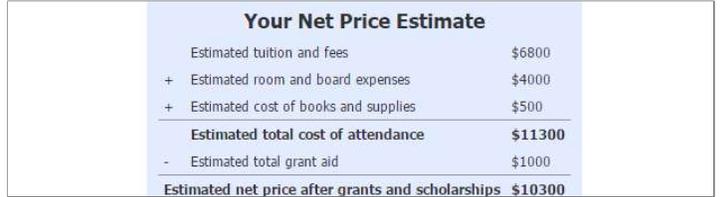
Message Groups

Message Groups allow recipients to opt-out of specific communication campaigns, rather than all future communications.

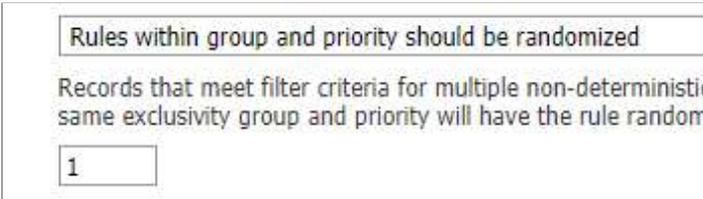
Slate Features—Comprehensive capabilities and limitless possibilities



Mobile Inbox
Provision multiple SMS numbers, and route inbound SMS messages to the Inbox with real-time updates.



Net Price Calculator
The Net Price Calculator is a pre-built Slate form found in the Slate Template Library, including built-in scripting to determine the estimated family contribution (based on the federal formula) and what the estimated grant level will be.



Non-deterministic Rules
Set non-deterministic rules when you need to randomize a process.



Offline Application Reading
Counselors on the road don't always have internet access, but with the Slate App, they can now read files offline.



Offline Event Check-in and Registration
Use the Slate Mobile App to manage offline events. When hosting an event with no internet service, download event details in advance to the Slate Mobile App. Mark registrants as attended, update guest counts, and even conduct on-site registration all while being offline. Once reconnected to internet, all event registration data will be seamlessly imported back into Slate.



Optimize Emails for Mobile Devices
In an increasingly mobile world, it is imperative for emails to be mobile responsive. Within Slate's Deliver tool, a small snippet of script can be enabled to resize images on mobile devices.



Origin Groups and Sources
Origin Groups allow you to define what data points should be considered when calculating the "first source" and "last source" for a record.



Outbox
When sending a large mailing or print campaign via Deliver, use Outbox to hold messages, postcards, and letters for final review prior to delivery.



Parameters in Reports
Report URLs can include parameters that can be passed into filters within the report.



PDF Editor
Add PDFs to the Reader that contain custom information that is important to your reading process.

Slate Features—Comprehensive capabilities and limitless possibilities

Folder: System
 User: Technolutions Service Desk
 Populations: Applications
 Execution Mode: Retrieve all records each time query is run

- Edit Properties
- Edit Web Service
- Sharing Permissions
- Schedule Export
- Preview Results
- Display SQL
- Save Copy

Exports
 Name: [] Export

PDF Editor Merge Query

While a plethora of merge fields are available for use within the PDF Editor, it is possible to convert any export into a merge field using a special type of query.

LOOKUP

Partial Match: Search...

Estimated Rows

Add Filter: Filter NOT (OR)

Person Index Search

Search for records in Slate using the standard search parameters, or custom search parameters like an ID number from a student information system.

2017 Early Action

Awaiting Payment
 Submitted January 12, 2017
 Last updated June 14, 2017

Current Bin: Second Read
 Queue: [Technolutions Service Desk](#)

Entry Term: 2017 Fall
 Major: Biology

Person Record Dashboard

Customize the leading section of the Dashboard Tab and Application Tabs of a person record with a combination of HTML and merge fields.

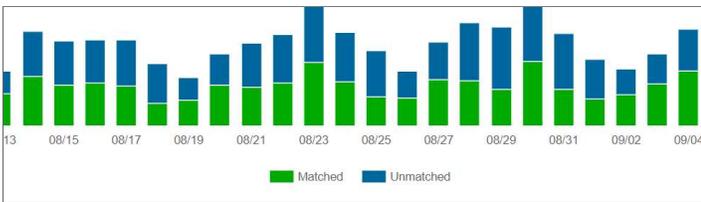
Recommendation

Applicant: Joshua TEST Henry TEST
 Applying to: Slate Demo
 Recommender: Jeffrey TEST Holmberg TEST

Applicant Information
 Applicant Name: Joshua TEST Henry TEST
 Message from Applicant: Mr. Holmberg TEST. Thank you for providing a recommendation supporting my application to Slate University!
 Message from Recommender: Under the Family Education Rights and Privacy Act of 1974 (Buckley Amendment), which gives registered students the right to inspect and review their educational records, students may waive the right to see specific confidential statements and letters of recommendation. In the belief that applicants, and the persons from whom they request recommendations, may wish to preserve the confidentiality of those recommendations, we are giving you an opportunity to sign one of the following statements.
 I waive my right to access this report.
 I do not waive my right to access this report.

Personal Message to Recommenders

Applicants can enter a personalized message in the Slate-hosted application that can be included in the email notification recommenders receive, and will display to their recommenders on the recommendation form.



Ping

Ping is an analytics service that records user-specific web traffic and associates the history with Slate records.



Ping Analytics

Ping Analytics provide a summarized interactive view of Ping data organized by various methods.



Ping Everywhere

Enable integrated ads and analytics between Slate and Facebook.

#SlateOnTour

You might be interested in meeting us at the following event(s)

Date	Event	Location	Exhibit

Ping Pong

Embed custom content on an outside web page based on Ping data.

Filters: Entry Term: **PINNED** IN Spring 2018, Fall 2018

Metric	Prospect	Applicant	Conversion Rate	Admit	Acceptance Rate	Commit	Yield Rate
Sex							
F	16471	199	1.21%	56	28.14%	0	0.00%
M	15483	201	1.30%	56	27.86%	0	0.00%
Total	31954	400	1.25%	112	28.00%	0	0.00%
Sex							
	Prospect	Applicant		Admit		Commit	

Pinned Filters in Reports

Similar to a query, filters can be pinned and accessed at the top of the report at the time it is rendered. This allows users to select or change filter criteria without needing to edit the report.

Pop Record

Pop Tab

Share

Exit Reader

Pop-Out Tabs

When viewing an application in the Reader, the Reader Tab Group currently being viewed, as well as the entire application, can be popped out to open in another browser tab. This allows multiple components of an application to be reviewed at the same time in a split screen view.

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Pre-Review	Reads	First Read	Hold	Committee	Decided
Awaiting Submission 1	First Read 4	Virtual 0	Interview 0	Committee Review 2	Admit
Awaiting Payment 1	Second Read 7		Additional Materials 0	Committee Review 2 1	Waitlist
Awaiting Materials 0					Deny

Reader Bins

With the move from paper to online reading, Reader Bins act as a way to organize and move files through the reading process.

Applications (3)

Name	Submitted	Age	Sex
Name Suppressed	03/23/2016 05:43 PM	26	M
Name Suppressed	04/07/2016 03:11 PM	35	F

Reader Bins with Blind Reading

In some situations, you may want to hide the names of those that have previously read an application by bin. This can be accomplished by enabling Blind Reading.



Reader Bins with Blind Videos

Commonly used by music programs, enable the audio of a video audition, allowing for a blind review.

Sender "Slate Model" <service-desk@technolutions.com>
 Recipient {{email}}
 CC
 Subject You have {{count}} files to read!

Dear {{first}},

You have {{count}} files in your queue. Happy reading!

Reader Bins with Queue Notifications

Easily notify Slate readers that they have applications in their queue on a daily/weekly basis.

College Video Essay

- Dashboard
- Application
- Link

Reader Link

Embed a webpage inside of the student's application within the Reader.

References [Edit Bin/Queue](#) [Download PDF](#)

Essay

Resume

Reader Dashboard
Staff Assignment Matthew Burris
App Term Fall 2020
App Major Government

Additional Info

Decision	Confirmed	Released
...

Reader Popup Dashboards

Reader Dashboard queries can be created via the Query Builder, and can be configured to view read-only data in the dropdown panel when reading an application.

Default

Filter NOT (OR)

Population (Application) IN English

Reader Preset Filters

Easily pre-determine filters that can be used for staff members reading files.



Reader Reports

Any query or report can be embedded within the Reader for comparing applications or seeing aggregate statistics. See "Cluster Report" for a common example.

Weighted:

Yes

No

Academic Rating

1

2

Reader Review Forms

Associate a Reader Review Form with specific bins to customize the questions asked of your readers about applicants.

REDACT

documents

Redaction

Redact any section of a page while editing materials from the Materials tab, Batch Acquire, or the Reader within a processing-enabled bin.

Base Camp Session 1

- Wednesday, June 28 at 02:00 PM - Advanced Query
- Wednesday, June 28 at 02:00 PM - Drip Marketing
- Wednesday, June 28 at 02:00 PM - Portals
- Wednesday, June 28 at 02:00 PM - Report Builder

Related Events

Related Events allow you to consolidate event registration for multiple events into a single registration form.

Related Events Liquid Markup

Customize the display of related event title, date, and time when merging this information into communications.

2

Guest Information

Guest 1

First:

Last:

Guest 2 Delete

First:

Last:

[Add Guest](#)

Replicate Blocks

Utilize section breaks to define replicate blocks, allowing for the same field or grouping of fields to be repeated on a form.



Reports

Analyze data using Slate's robust reporting tools that enable year-to-year comparisons, arithmetic and statistical functions, and aggregate reporting with ease.



Reports in Portals

Reports can be embedded inside of any portal using the Portal Editor.

Active Active ▼

Type Permission ▼

Permission Administrator (All Access) ▼

Permissions Access Record

Restrict Access to Person Record

Occasionally it may be necessary to restrict access to a specific record so only a specific user or role group may be able to view and edit.

Summary: Reader Form Field

Source Type: Reader Form Field

Source Filter: Reader Form Field: Reader Review Form

Source Subfilter: Reader Form Field: Reader Review Form - aca_comments

Created x Days Ago: 80 Only items that were created more than this many days ago will be considered for this retention policy.

Filter Base: Applications

Filters

Estimated Rows: 1

Retention Policies

Retention policies can be defined to permanently delete data as broad as an entire record, or as narrow as a specific field of a specific form for any population of records.



Robocalling

Now even robocalling is possible with Slate's Deliver module. Set up recipient lists, record messages, and start calling the people you want to reach.

Add Export Export

First

Last

Formula: @first + ' ' + @last

Rule Formulas

Rule formulas allow for automation of complex calculations for custom fields. For example, rule formulas can calculate an academic index, perform arithmetic functions, concatenate multiple fields together, and more.

Notification: No notifications ▼

Format: Delimited (tab-delimited, CSV, etc.) ▼

Delimiter: Tab (<tab>) ▼

Headers: Include header row ▼

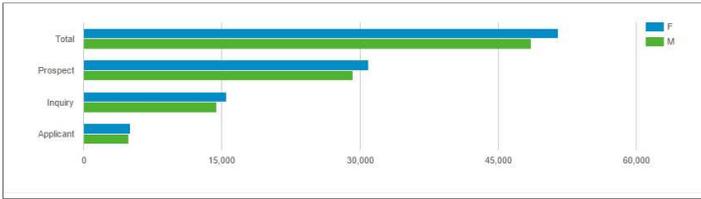
Text Qualifiers: Double quotes (") ▼

Line Endings: <C><Lf> ▼

Scheduled Data/Document Exports

Automate the export of data or documents from Slate to external document management or other third-party systems on a recurring schedule.

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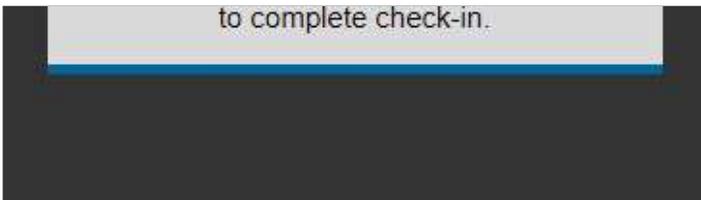
Scheduled Reports

Slate's powerful Report Builder enables complex aggregate reports to be scheduled for email delivery automatically on a recurring basis.



Seasonal Effects

Throughout the year Slate occasionally displays special seasonal effects within the Reader. Easily toggle off such effects, if desired.



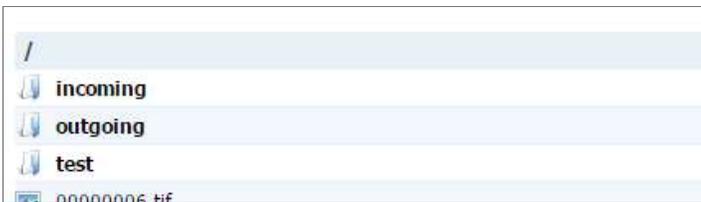
Self-Service Event Check-in with Geofencing

Event registrants can check themselves in within two miles of the event location.



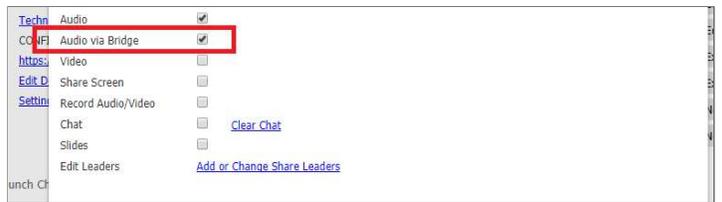
Self-Service Rescheduling

Registrant-side rescheduling makes it possible for registrants to reschedule themselves for events within the same template.



SFTP

Slate's file transfer servers support SFTP for both incoming and outgoing files. Automatically schedule any query to export a file onto the SFTP server, or easily consume a file into Slate placed on the SFTP server.



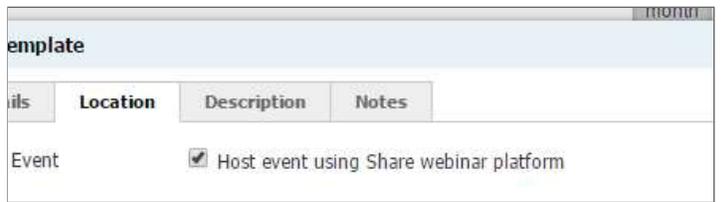
Share Bridge

When conducting an online webinar, Share Bridge allows the ability to include a conference bridge for two-way audio. Instead of using a separate phone line, audio from both presenters and participants can be included directly within Share and even recorded to use later.



Share Online Interviews

Slate's Share capability allows for interviews to take place on mobile devices, recording the conversation and adding it to the person record.



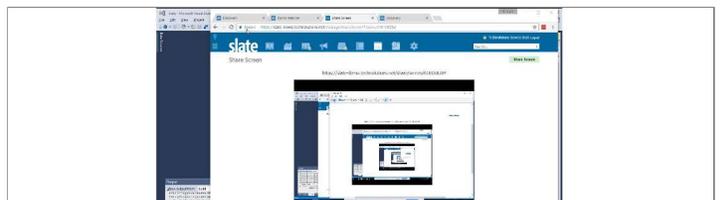
Share Online Webinars

Share sessions are created using the Events tool. These events use a location type of "Online" and provide an opportunity for interaction with people who may not be able to visit in person.



Share Recording

Use this feature to record the full content from any online webinar hosted through Slate's Share platform.



Share Screen

Use Share Screen to immediately share your screen with others after providing the automatically generated 9 digit code.

Slate Features—Comprehensive capabilities and limitless possibilities

Keys

Avatar Photos (0 = Disable, 1 = Enable)

Show or Hide Dashboard Gravatar Image

Slate automatically displays the Gravatar image associated with an individual's email address. If desired, these images can be inactivated via a Configuration Key.

Banking and Payment Information

Bank Routing Number (for ACH transfers of funds)

Bank Account Number

Currency

Short Name to Appear on Bank Transfers (may not display for all banks)

Transfer Schedule

Slate Payments

Slate Payments is the payment gateway built directly into Slate. Accept and customize payments for application fees, enrollment deposits, event fees, and more without the need for Technolutions intervention.

My super amazing training tips

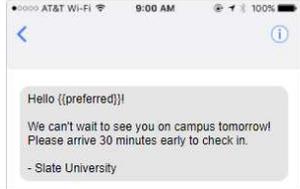
You can pin some database items!

Origin Sources (Updated 2 days ago)

Training Lessons, Origin Groups & Courses

Slate Scholar Custom Content

Online support is not only available within Slate via Slate Scholar, but it can be customized for partners' specific needs, offering custom content and how-to information unique to each institution.



SMS

In an increasingly mobile world, SMS messaging is even more important. With Slate's Deliver module, compose SMS messages to send on an individual basis or as part of a campaign.

Search Inbox...

	Sender	Role / User
about Slate University	Alexander Hamilton	Admissions Inbox

SMS Inbox

Communicate via text messages entirely from the SMS Inbox. Connect messages with person records, respond directly from Slate, track responses, and assign messages to Slate users.

Sign in with Facebook

Sign in with LinkedIn

Sign in with Google

Social Login

Simplify authentication by allowing applicants and form registrants to login using their Google, Facebook or LinkedIn credentials.

Citizenship =US	Record	Citizenship 1
SSN =555328924	Record	SSN
Permanent Resident =Yes	Record	Permanent Resident
Race =Black or African American,Native Hawa...	Fields	Other - Race
Type =Not Hispanic	Fields	Other - Hispanic
Permanent_Street_1 =1420 N Hobart	Record	Permanent Address - Street
Permanent_Street_2 =#172	Record	Permanent Address - Street 2
Permanent_Street_3 =Gateway	Record	Permanent Address - Street 3
Permanent_City =Pampa	Record	Permanent Address - City
Permanent_Region =TX	Record	Permanent Address - Region

Source Format

Source Formats allow for a quick and easy way to upload recurring file transfers into your database. Use the Standard Slate Formats or create your own.

Personal Background

Biographical		I wonder if he's related to Lin-Manuel Miranda
Prefix	Mr.	
First Name	Alexander	
Last Name	Hamilton	
Sex	Male	
Birthdate	09/16/1995	

Sticky Notes

Sticky notes can be created and added in the Reader.

ous Visit

Campus Tour

AM T

PM T

Subfolders

Keep everything from Queries, to Events, to Deliver campaigns organized and easy to locate.

Dear {{sys-preferred}},

Thanks for your interest - we look forward to welcoming you to campus.

We have you scheduled for the following events:

Subqueries in Liquid Markup

Iterate through a set of items in a Liquid Markup loop by passing a subquery into the query results.

Slate Features—Comprehensive capabilities and limitless possibilities



Tags

Tags allow for an at-a-glance way to categorize records at a high-level within your database. Set and remove Tags right from the person record Dashboard tab.



Tandem Reader with Share

Slate Share video conferencing functionality is available through the Reader to facilitate tandem reading or committee-based evaluations.

Launch Test Environment

Slate supports the self-service provisioning of a test environment that may be used whenever such an environment would be useful. Test environments are subject to several important [usage guidelines](#), so please read and review these prior to utilizing your test environment. Additional test environment slots are available at additional cost. Submit a Service Desk request to inquire further.

Database	slate-demo
Organization	Slate Demo
Endpoint	https://slate-demo.test.technolutions.net/manage/
Status	Active
Snapshot Date	05/05/2017
Lease Start	05/05/2017
Lease Termination	Non-expiring if use remains active (at least one login every 30 days)
Authorizing User	Technolutions Service Desk

Important Warning: Refreshing a test environment will permanently delete all data and configurations in the current test environment and will replace the test environment with a copy of the current production environment. A test environment should not be refreshed until you are ready to start fresh again.



Test Environment

Provision a copy of your Slate database exactly as it appears today to use for testing purposes.

Time Tracking

Time tracking allows you to gauge how long a user has spent on a certain task, such as how long they may have spent reviewing an application.

Launch time warp

Slate supports the self-service provisioning of an environment restored to a specific point in time from the past 60 days.

Database	slate-demo
Organization	Slate Demo
Endpoint	https://slate-demo-backup.test.technolutions.net/manage/
Status	Expired
Snapshot Date	06/14/2017 Time (Eastern Time) 07:52:33 PM
Snapshot Type	<input checked="" type="radio"/> Express: Restore to latest weekly backup directly preceding snapshot date <input type="radio"/> Restore to exact moment in time
Lease Start	06/14/2017
Lease Termination	96 hours from lease start
Authorizing User	Technolutions Service Desk

Object Type	Count	Object Type	Count	Overview
Person Data	3	Person Data	3	Activities/Interactions
Activities/Interactions	5	Activities/Interactions	1	Person Data
Addresses	1	Addresses	1	Addresses
Applications	0	Applications	0	Applications
Devices	4	Devices	1	Devices
Fields	10	Fields	5	Fields
Form Responses	9	Form Responses	11	Form Responses
Interests	0	Interests	0	Interests
Jobs	0	Jobs	0	Jobs
Materials	0	Materials	0	Materials
Payments	0	Payments	0	Payments
Relations	0	Relations	0	Relations
Source	0	Source	0	Source
Sports	0	Sports	0	Sports

Time Warp

Provision a copy of your Slate database exactly as it appeared at a specific date and time within the past 60 days down to the second.

Transfer Objects

Duplicates happen. When consolidating records, there are times you may want to merge all data elements from an alias record into a master record. However, there may also be times when you want to move only specific data elements into the master record. Transfer Objects provides granular control over which specific data elements should be moved to another record.

Country Code	String	253
Duolingo-JELTS	Integer	71
Duolingo-TOEFL	Integer	71
noodles	String	4 Yes
numbers	Integer	2 Yes
race	String	5 Yes
rating	Real	5
rating_form	Integer	5 Yes
Sample Event Code Export	String	1
SAT-ACT	Integer	110
SAT-SATR	Integer	121
SAT-N-SATRM	Integer	61
SAT2400-ACT	Integer	166

Travel Details in Trips

Include flight, train, and hotel details within a trip. Airports are searchable by city, airport name, or three-letter airport code. When flight information is inserted into a trip, flight details such as status (for example, "On Time"), departure and arrival times, terminal and gate information, baggage carousel, and aircraft type will be visible within the trip.

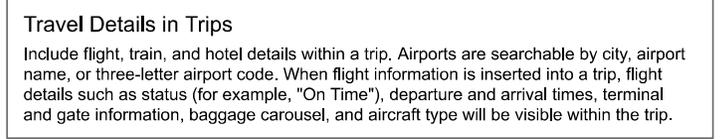


Translation Codes

Simplify the integration and export process by defining your own translation keys for sending data to external systems.

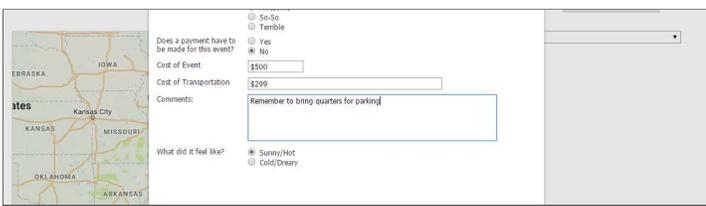
Trips

Use the Trips tool to plan events, meetings, coffee stops, and hotel stays. Through address verification, Slate can pin these stops on a map allowing for a visual representation of your planned itinerary.



Trip Notes

Compile and track notes about a trip via a custom form.

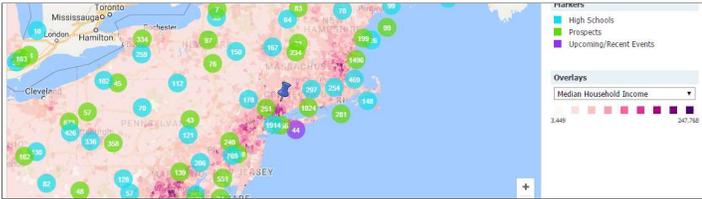


Trips

Use the Trips tool to plan events, meetings, coffee stops, and hotel stays. Through address verification, Slate can pin these stops on a map allowing for a visual representation of your planned itinerary.



Slate Features—Comprehensive capabilities and limitless possibilities



Trips & Voyager Integration

When planning a trip, it is often useful to visualize additional data about the surrounding area. Easily overlay student data, events, local high schools and colleges, and census data from the American Community Survey (ACS) onto a trip using a pre-built Voyager.



Twitter

Tweeting is even easier with Slate's Deliver module. Sync the appropriate accounts and compose tweets within Deliver that post directly to your institution's Twitter feed.



User Role Groups

Admissions counselors, operations staff, or IT. Simplify and consolidate the permissions associated with a specific User by placing them into a user Role Group.



UTM Codes/Analytics

What are your users looking at? Now you can find out. With UTM codes, you can track links, clicks, and campaigns.



Vericant Integration

Vericant offers recorded, in-person interviews for international applicants.



Video Essay

Video essays and video interviews can be used within Slate to bulk screen applicants for personality, extemporaneous speaking, and English language capabilities.



Voyager

Voyager is a data visualization tool that allows you to combine information about records, datasets, and census data from the American Community Survey (ACS).



Waitlist Transfer

Do your events have registration limits and waitlists? Handle transfers from the waitlist to 'Registered' automatically with Waitlist Transfer functionality.

Slate Features—Comprehensive capabilities and limitless possibilities

Clark, Alexander

Watch Flags: VIP - Related to Administrator

Dashboard Timeline Giving Profile Materials

Watch Flag

Need an easy way to identify specific records? Take advantage of Watch Flags to put a custom banner at the top of the person record page.

Schedule Export

Status: Active

Server: Web Service

Endpoint: <https://exampledestinationserver.edu/api/TGYCp8BYAQI3iWHgaYpV8UfK9KfJxNCC>

Notification: No notifications

Format: JSON

Requested Delivery Window (Eastern Time):
 Overnight: 2:00am–4:00am (preferred window)
 Morning: 10:00am–12:00pm
 Midday: 12:00pm–2:00pm
 Afternoon: 2:00pm–4:00pm

Sharing Permissions: Schedule Export

Preview Results

Display SQL

Save Copy

Export

Web Services and Hooks

Poll external web services for new data as well as push Slate data into an external service for seamless integration with third-party systems. Slate can also make endpoints available to be polled regularly or accept a push for incoming data.



Widgets

Create simple charts to appear on the Slate homepage or within the Reader tool to reveal high-level statistics to Slate users.

Awaiting Review	Reader Review	Committee Review	Decision
Awaiting Submission (UG)	First Read	Committee Review	Admit
Awaiting Materials	Second Read		Deny
	Hold		Waitlist
			Defer

Slate Scholarships [edit](#) [read](#)

Current Bin: Scholarship Review

Review	Decision
Scholarship Review	Approve

Workflows

Route applications, person, or dataset records through alternate workflows concurrently during the review process. For example, review applications, scholarships, and 1-20 documents through three parallel workflows for the same application.

Slate Technical Details

Secure Hosting

Technolutions provides all hosting, network, and server management for Slate in secure, modern datacenters, through the use of the Amazon Web Services (AWS) cloud. Production services are hosted in the us-east-1 region in Northern Virginia, with services duplicated across two availability zones. Each availability zone consists of one or more discrete datacenters, each with redundant power, networking, and connectivity, housed in separate facilities, and physically and operationally isolated from the other availability zones. All data and machine configurations are further replicated to the us-west-2 region in Oregon for disaster recovery. Institutions based outside of the United States have the opportunity to locate their data in the ca-central-1 region in Canada or the eu-west-1 region in Ireland. No sensitive data is stored outside of the institution's designated region, and content delivery network servers throughout the world cache static, non-sensitive resources. Datacenters undergo annual SOC audits, and no issues have ever been identified from these audits, nor has there ever been a data or security incident of any kind.

Encryption in Transit

All data is received and transmitted over TLS, using 2048-bit keys. Due to vulnerabilities with the SSL protocol, no connections using SSL are supported and only connections over secure versions of TLS may be initiated. 128-bit asymmetric encryption is enforced as the minimum, with 256-bit AES encryption available as the default for supported clients. Forward secrecy is supported within all modern browsers.

Encryption at Rest

All data is stored in encrypted databases on encrypted filesystems in secure datacenters, using 256-bit AES encryption.

Single Sign-On

Slate integrates with institutional single sign-on, including CAS, LDAP / Active Directory, SAML / Shibboleth / AD FS, and other identity and authentication providers, with permission- and role-based authorization tables. Technolutions is a member of InCommon. Slate supports multifactor authentication.

Permissions and Roles

Slate provides field-level, function-level, and feature-level security, enabling granular control of access permissions and rights. An institution can create any number of custom permissions and roles, each of which may contain any number of standard or custom permissions. A user may be assigned to any number of roles and will assume the security permissions from each.

High Performance, High Availability

Slate utilizes redundant systems and resources at every level in the architectural stack. Should Slate become unavailable for any localized reason, we immediately begin a failover process that takes approximately 15 seconds to complete. We regularly add servers and computational capacity to provide real-time data with ever-increasing performance. Slate typically achieves “five nines” of availability, with downtime of less than 5 minutes for the entirety of the calendar year. A transaction enters the Technolutions network through redundant firewalls and load balancers, where all non-essential ports are closed and traffic is evaluated through deep packet inspection. The requests are answered by nodes in

the web cluster, which pass requests to parameterized procedures through limited-rights accounts to nodes in the database cluster. The web, worker, and database clusters do not have publicly-routable addresses, and the web clusters are only accessible via the load balancers and application security firewalls. Capacity is regularly evaluated and added to support continued growth and resource utilization. We test and verify the redundancy of these systems quarterly and after major changes.

Business Continuity and Disaster Recovery

Technolutions is headquartered in New Haven, Connecticut and Portland, Oregon. In New Haven, we occupy three full floors in an office tower downtown. In Portland, we occupy a floor in an office tower downtown. Each office provides staff and geographic redundancy, and employees may access tools remotely via secure, two-factor VPN connections and terminal servers in the event of limited physical access to our New Haven or Portland offices.

Comprehensive Insurance Coverage

Technolutions maintains, through Chubb (A.M. Best rated A++ Superior), policies in the amounts of \$1,000,000 per occurrence for comprehensive business liability, \$2,000,000 aggregate for comprehensive business liability, \$4,000,000 per occurrence for excess liability, \$1,000,000 per accident for workers' compensation, \$1,000,000 disease policy limit for workers' compensation, and \$7,000,000 for technology services errors and omissions liability.

Accessibility and Compliance

Slate maintains compliance with all laws and standards, including PCI compliance for all financial transactions, NACHA compliance for all ACH transactions, FERPA compliance for the protection of student information, GDPR compliance, and adoption of and adherence to Section 508 ADA as accessibility guidelines, implemented through the WCAG 2.0 accessibility guidelines.

Session Authentication

All requests to Slate resources are routed over HTTPS with a minimum grade of 128-bits enforced. Any request over HTTP is automatically redirected to HTTPS, including a browser-based non-network redirect to HTTPS based upon cached HSTS information. When a user authenticates with Slate, a new login entry is created for the user in the database, with a session ID as a 128-bit UUID, their user ID (also a 128-bit UUID), the IP address they are logging in from, a machine cookie that is set (to be able to uniquely identifier a particular computer/browser), the user agent (browser string), the login date/time, and the expiration date/time of the credentials (usually 60 minutes). Slate then sets a session cookie in the browser with the "HttpOnly" flag set (preventing it from being accessed by client-side script) along with the "secure" flag (preventing it from being sent over HTTP). The cookie has the value of the 128-bit session ID. These cookies are set as session cookies (no expiration set) and are deleted upon closing the browser. Upon every request to an authenticated resource, we check the session ID from the cookie against the persistent machine cookie and IP address stored, in addition to verifying that the session has not been expired (such as clicking "logout" which forces immediate expiration of the ticket in the system, or having the expiration date/time elapse). Each new authenticated page request extends the lifetime of the session. These session IDs are completely unique and cannot be guessed.

Transit Layer

- Requests over HTTP are redirected to HTTPS.
- HTTP Strict Transport Security headers set to prevent against HTTPS downgrade attacks.
- Only secure versions of TLS are supported and all versions of SSL are disabled.
- Request verbs are limited to GET, HEAD, and POST.

- Request content length is limited as appropriate.
- Cache expiration is enforced (“Expires: 0” and “Cache-Control: private” or “Cache-Control: no-cache”) on all secured pages.
- Content is compressed using gzip or deflate if supported by the browser.
- Static content is cached server-side with non-immediate browser expiration and via edge-servers in content delivery network utilizing international datacenters for low latency access all around the world. Sensitive data is never accessed by or through the content delivery network.

Application Layer

- No platform-specific file extensions or headers are used, helping to obfuscate the application and platform types.
- No source code is published to production servers. Application code is fully compiled.
- Application code is fully managed, and there is no native application code which might provide a vector for a buffer overflow.
- No detailed error messages are ever displayed externally.
- Unhandled exceptions are logged automatically for evaluation.
- Uploaded files are never committed to web-readable directories.
- Parameterized procedures are used for all transactions, eliminating the vector for SQL injection attacks.
- Pages are rendered by building an XML document and transforming that against an XSL transform, which escapes all data by default. Under no circumstances is output escaping ever disabled for user input.
- Sequential identifiers are never used. Only 128-bit UUIDs are used for primary record identifiers.
- Sessions are maintained by generating a UUID in a login table and assigning that UUID to a session cookie, and may be remotely terminated by an authenticated user or automatically upon session expiration.
- Unnecessary whitespace from all rendered pages is removed, all CSS are minified, and all Javascript resources are obfuscated and minified.
- Non-authenticated redirectors require a salted URL hash to prevent abuse.
- External user accounts are activated using the external user’s email address and a 9-digit PIN that is transmitted by email, in addition to the birthdate for verification purposes (optional), which is not communicated by email. Upon activation, the external user must set a password of his/her choosing. A salted hash is stored instead of plaintext passwords.
- Administrative users are authenticated against institutional SSO. Passwords are never stored.

Storage Layer

- All implementations of Slate use the same database schema that is centrally developed, tested, and administered.
- Each Slate instance has its own discrete database, and no institutional data is ever commingled with data from other institutions or stored in a database that could be accessed by users from another institution.
- Databases run with full transaction logging. Transaction logs are backed up every 3 hours and are held for at least 60 days, providing point-in-time restores for that duration. Full backups are taken weekly and are held for at least 60 days. The outside duration of the Recovery Point Objective is 3 hours, and the outside duration of the Recovery Time Objective is 12 hours (the RTO for most issues would be measured in seconds), depending upon the severity of the issue.
- Document stores are versioned and all versions are automatically replicated throughout the us-east-1 region, with near real-time replication to the us-west-2 region.

Infrastructure Layer

- Administrator-level permissions are closely controlled, and no generic accounts are ever permitted for server-level access.
- Audit logs are held for at least 1 year and are replicated nightly to off-site storage.
- Servers run recent versions of their operating systems (Microsoft Windows Server 2016) and the latest versions of the database servers (Microsoft SQL Server 2016).
- Servers are patched regularly every month and as necessary for critical 0-day exploits.
- Secure connections are brokered through Windows Domain accounts using NTLM authentications, and SQL authentication is never used or permitted, nor are passwords permitted to be stored within application code.
- Forest and domains run at the highest functional levels, with all insecure protocols and encryption algorithms disabled.
- Services run under limited-access accounts.
- No servers have publicly-routable addresses, with all public IPs held by the firewalls and load balancers and only specific ports routed to private IPs.
- Remote Desktop access is limited to the connections from within the VPN.
- VPN access requires two-factor authentication, where one factor is the password followed by a token, and the second factor is human-approved response from an authorized mobile phone.
- Group policies are employed to limit wireless and remote storage access.

Data Integration and Migration

Slate supports the bi-directional transfer of data between Slate and external systems, including student information systems such as PeopleSoft, Banner, Colleague, and Jenzabar, financial aid systems such as PowerFAIDS, search lists and score data files, and homegrown systems. Data integrations are achieved through several different mechanisms, enumerated below:

Data Export (Slate to an external system)

- Batched exports
These are built in the query tool and involve the generation of flat files (fixed-width, delimited, XML, JSON, etc.) on a scheduled frequency. Any code and value translations can be configured within Slate but outside of the query, so the query can be stable and immutable even when new entry terms, majors, and other code changes are introduced. This also ensures that the process on the campus system (e.g., SIS, ERP, etc.) side remains stable year-over-year, too. These exports can be cumulative, incremental, or differential. This differential option uses notification queues to track which records have changed since the export was last run, so full rows are returned for only the students for whom there has been some change to their record. This is typically the most appropriate option for exports to a campus system. The exports can be scheduled to occur on a daily frequency (or more frequently, as desired) and can be run on-demand for those instances throughout the year where you may need to update the campus system more immediately after adding/changing a batch of decisions. Exports can be pushed out to our SFTP servers or to a remote SFTP server. For exports to a campus system, we generally advocate for the use of batched exports, using delimited differential files, on a nightly overnight frequency, and to our SFTP server, where a school can then poll the /outgoing/ directory periodically to pull down and load any files. There are several major benefits to the batched export option. First, if exporting to our own SFTP server, we can ensure that it remains online/operational during the export. Second, there is the inherent logging of all exports that occurs just by preserving/archiving the exported files. This provides a great resource for troubleshooting if ever necessary. Third, the exports are scheduled to occur within a delivery window, but the particular execution time within that window (e.g., 2:00am until 4:00am) can be moved around based upon server maintenance activity and load. Fourth, we can provide automated email notifications upon successful, late, and/or failed generation and

delivery of scheduled exports. Fifth, if using a delimited file structure, depending upon the capabilities of your system, new fields may be added to the export without it breaking anything on the campus system end.

- Web services

The same query that would be built for a batched export can be made available as a web service at any time simply by enabling web services on the query. If a specific XML structure was desired, there would be some modifications to the query, but they would generally be reasonably minor. When coupled with notification queues, these would enable the school to poll the web service on a frequency that they define and pull down just the new/changed records each time. Web services are a fine and production-appropriate option, but they usually don't offer enough additional business value to outweigh the benefits offered by batched exports. Typically, the data is not so volatile and the business need to see that data reproduced in a campus system so great that frequent web service polling would even be necessary, so a batched export usually achieves all the business process requirements. Web services are also much more difficult to troubleshoot, should the need arise, since the request and response are transient.

- Other options

Batched exports can be utilized for a nightly feed and coupled with web services for an update/incremental feed of perhaps a limited set of data points, individual records could be requested using APIs or custom web services, or we could post data to a remote web service, so there exists an array of additional options, but 95% of all data integrations typically use the batched file approach.

Data Import (from an external system into Slate)

- Batched imports and data migrations

These are essentially the reverse of the batched export process, but configured and managed using different tools within Slate. Most frequently, the school delivers files to import to an /incoming/ directory on our SFTP server, which we poll frequently (at least once every 15 minutes) and load any files matching a specified filename mask. We can poll a remote SFTP server, too, but to the point of SFTP server availability, since we can ensure that our servers remain highly available, the experience is usually most reliable when using our infrastructure. These files can be delimited, fixed width, XML, etc., and we typically recommend that delimited files with column headers be used, since you can add/remove columns at any time without breaking the import process within Slate. This allows for asynchronous changes to the data feed specifications. The files are routed into our Upload Dataset tool, where the format can be predefined to handle all value and code translations, ensuring that the year-over-year changes to accommodate new fields or values is straightforward and can be handled by non-technical end users. This same Upload Dataset tool is used for importing data from search lists, score data files, and historical data migrations.

- Transactional web services

Web services can be created within Slate to update individual properties on individual records. These are appropriate for purely transactional events, but since they would execute synchronously, there could be some record locking while changes are committed. These also wouldn't be appropriate under high volume, since thousands of writes is not nearly as efficient as a single batched write to thousands of records. These typically require custom SQL, so their maintainability is not as straightforward.

- Batched web services (synchronous)

Like the transactional web services, an XML post could be submitted containing updates to be made to a lot of records. Since these would be executing synchronously for a group of records, the likelihood of record locking as changes are made and committed is greatly increased. These also typically require custom SQL, so maintainability is potentially an issue here.

- Batched web services (deferred)
This option provides a web service way to post files into Slate that are then processed by the Upload Dataset mechanism, just as if the files were transferred via SFTP. These could include XML posts but can also include delimited data. Since the updates are processed through our Upload Dataset mechanism, the changes can be queued, batched, and run in the most efficient manner possible which will minimize or eliminate any potential for observable record locking.
- Remote web services (scheduled)
Slate can also consume data from remote web services and, like pulling down a file from a remote SFTP server, can route the data into the Upload Dataset import system. There is a time and place for this option, but it's not frequently utilized.

Document Import

Document Imports should occur over SFTP, since a ZIP archive containing thousands of PDFs could potentially be quite large. Files are typically sent using a DIP file approach, wherein a ZIP archive is generated containing PDFs/TIFFs of the documents to be imported along with an index file containing the filename of each document and any associated metadata parameters (an SIS ID and document type, for example). Slate can then extract the documents and index file and import the documents onto the appropriate student records. Slate can also extract metadata from within a filename, so you could have files with an SIS ID and document code in the filename and obviate the need for an index file, but usually the DIP approach is best here. We always recommend encapsulating all of these documents into a ZIP file, since SFTP is much more efficient with the transmission of a single file (e.g., a ZIP archive) instead of with the transmission of thousands of individual files. We also prefer PDFs to TIFFs, since a digital PDF of non-scanned data would be a fraction of the size of a TIFF, since a TIFF is a rasterized/bitmapped image that won't contain any digital text content and thus cannot be enlarged beyond the original resolution without a loss of fidelity.

Document Export

Like document imports, Slate also supports the scheduled and on-demand export of any set of document types for any population of records. These are typically delivered in a ZIP archive to our SFTP servers.

Direct SQL access

We support direct SQL access from workstations/servers at the institution into their Slate database, but this is for ad hoc use only and is not intended for data integrations. This is for a few reasons. First, if the data integration exists entirely outside of Slate, Technolutions will not be aware of it and will not be able to proactively address the potential effects of schema changes. Second, direct SQL access is not schedulable on our end since the queries are being remotely initiated. Third, a poorly written SQL query could over-consume resources and create performance issues that are much more difficult to troubleshoot without visibility into what or how something was being used. Fourth, the access is all or nothing, so any user with direct SQL access has complete read-only access to the database.

Additional information is available upon request.

Technolutions / www.technolutions.com

Technolutions New Haven / 234 Church Street, FL 15 / New Haven, Connecticut 06510
Technolutions Portland / 1211 SW 5th Avenue, STE 2800 / Portland, Oregon 97204

Slate Technical Details

Secure Hosting

Technolutions provides all hosting, network, and server management for Slate in secure, modern datacenters, through the use of the Amazon Web Services (AWS) cloud. Production services are hosted in the us-east-1 region in Northern Virginia, with services duplicated across two availability zones. Each availability zone consists of one or more discrete datacenters, each with redundant power, networking, and connectivity, housed in separate facilities, and physically and operationally isolated from the other availability zones. All data and machine configurations are further replicated to the us-west-2 region in Oregon for disaster recovery. Institutions based outside of the United States have the opportunity to locate their data in the ca-central-1 region in Canada or the eu-west-1 region in Ireland. No sensitive data is stored outside of the institution's designated region, and content delivery network servers throughout the world cache static, non-sensitive resources. Datacenters undergo annual SOC audits, and no issues have ever been identified from these audits, nor has there ever been a data or security incident of any kind.

Encryption in Transit

All data is received and transmitted over TLS, using 2048-bit keys. Due to vulnerabilities with the SSL protocol, no connections using SSL are supported and only connections over secure versions of TLS may be initiated. 128-bit asymmetric encryption is enforced as the minimum, with 256-bit AES encryption available as the default for supported clients. Forward secrecy is supported within all modern browsers.

Encryption at Rest

All data is stored in encrypted databases on encrypted filesystems in secure datacenters, using 256-bit AES encryption.

Single Sign-On

Slate integrates with institutional single sign-on, including CAS, LDAP / Active Directory, SAML / Shibboleth / AD FS, and other identity and authentication providers, with permission- and role-based authorization tables. Technolutions is a member of InCommon. Slate supports multifactor authentication.

Permissions and Roles

Slate provides field-level, function-level, and feature-level security, enabling granular control of access permissions and rights. An institution can create any number of custom permissions and roles, each of which may contain any number of standard or custom permissions. A user may be assigned to any number of roles and will assume the security permissions from each.

High Performance, High Availability

Slate utilizes redundant systems and resources at every level in the architectural stack. Should Slate become unavailable for any localized reason, we immediately begin a failover process that takes approximately 15 seconds to complete. We regularly add servers and computational capacity to provide real-time data with ever-increasing performance. Slate typically achieves “five nines” of availability, with downtime of less than 5 minutes for the entirety of the calendar year. A transaction enters the Technolutions network through redundant firewalls and load balancers, where all non-essential ports are closed and traffic is evaluated through deep packet inspection. The requests are answered by nodes in

the web cluster, which pass requests to parameterized procedures through limited-rights accounts to nodes in the database cluster. The web, worker, and database clusters do not have publicly-routable addresses, and the web clusters are only accessible via the load balancers and application security firewalls. Capacity is regularly evaluated and added to support continued growth and resource utilization. We test and verify the redundancy of these systems quarterly and after major changes.

Business Continuity and Disaster Recovery

Technolutions is headquartered in New Haven, Connecticut and Portland, Oregon. In New Haven, we occupy three full floors in an office tower downtown. In Portland, we occupy a floor in an office tower downtown. Each office provides staff and geographic redundancy, and employees may access tools remotely via secure, two-factor VPN connections and terminal servers in the event of limited physical access to our New Haven or Portland offices.

Comprehensive Insurance Coverage

Technolutions maintains, through Chubb (A.M. Best rated A++ Superior), policies in the amounts of \$1,000,000 per occurrence for comprehensive business liability, \$2,000,000 aggregate for comprehensive business liability, \$4,000,000 per occurrence for excess liability, \$1,000,000 per accident for workers' compensation, \$1,000,000 disease policy limit for workers' compensation, and \$7,000,000 for technology services errors and omissions liability.

Accessibility and Compliance

Slate maintains compliance with all laws and standards, including PCI compliance for all financial transactions, NACHA compliance for all ACH transactions, FERPA compliance for the protection of student information, GDPR compliance, and adoption of and adherence to Section 508 ADA as accessibility guidelines, implemented through the WCAG 2.0 accessibility guidelines.

Session Authentication

All requests to Slate resources are routed over HTTPS with a minimum grade of 128-bits enforced. Any request over HTTP is automatically redirected to HTTPS, including a browser-based non-network redirect to HTTPS based upon cached HSTS information. When a user authenticates with Slate, a new login entry is created for the user in the database, with a session ID as a 128-bit UUID, their user ID (also a 128-bit UUID), the IP address they are logging in from, a machine cookie that is set (to be able to uniquely identifier a particular computer/browser), the user agent (browser string), the login date/time, and the expiration date/time of the credentials (usually 60 minutes). Slate then sets a session cookie in the browser with the "HttpOnly" flag set (preventing it from being accessed by client-side script) along with the "secure" flag (preventing it from being sent over HTTP). The cookie has the value of the 128-bit session ID. These cookies are set as session cookies (no expiration set) and are deleted upon closing the browser. Upon every request to an authenticated resource, we check the session ID from the cookie against the persistent machine cookie and IP address stored, in addition to verifying that the session has not been expired (such as clicking "logout" which forces immediate expiration of the ticket in the system, or having the expiration date/time elapse). Each new authenticated page request extends the lifetime of the session. These session IDs are completely unique and cannot be guessed.

Transit Layer

- Requests over HTTP are redirected to HTTPS.
- HTTP Strict Transport Security headers set to prevent against HTTPS downgrade attacks.
- Only secure versions of TLS are supported and all versions of SSL are disabled.
- Request verbs are limited to GET, HEAD, and POST.

- Request content length is limited as appropriate.
- Cache expiration is enforced (“Expires: 0” and “Cache-Control: private” or “Cache-Control: no-cache”) on all secured pages.
- Content is compressed using gzip or deflate if supported by the browser.
- Static content is cached server-side with non-immediate browser expiration and via edge-servers in content delivery network utilizing international datacenters for low latency access all around the world. Sensitive data is never accessed by or through the content delivery network.

Application Layer

- No platform-specific file extensions or headers are used, helping to obfuscate the application and platform types.
- No source code is published to production servers. Application code is fully compiled.
- Application code is fully managed, and there is no native application code which might provide a vector for a buffer overflow.
- No detailed error messages are ever displayed externally.
- Unhandled exceptions are logged automatically for evaluation.
- Uploaded files are never committed to web-readable directories.
- Parameterized procedures are used for all transactions, eliminating the vector for SQL injection attacks.
- Pages are rendered by building an XML document and transforming that against an XSL transform, which escapes all data by default. Under no circumstances is output escaping ever disabled for user input.
- Sequential identifiers are never used. Only 128-bit UUIDs are used for primary record identifiers.
- Sessions are maintained by generating a UUID in a login table and assigning that UUID to a session cookie, and may be remotely terminated by an authenticated user or automatically upon session expiration.
- Unnecessary whitespace from all rendered pages is removed, all CSS are minified, and all Javascript resources are obfuscated and minified.
- Non-authenticated redirectors require a salted URL hash to prevent abuse.
- External user accounts are activated using the external user’s email address and a 9-digit PIN that is transmitted by email, in addition to the birthdate for verification purposes (optional), which is not communicated by email. Upon activation, the external user must set a password of his/her choosing. A salted hash is stored instead of plaintext passwords.
- Administrative users are authenticated against institutional SSO. Passwords are never stored.

Storage Layer

- All implementations of Slate use the same database schema that is centrally developed, tested, and administered.
- Each Slate instance has its own discrete database, and no institutional data is ever commingled with data from other institutions or stored in a database that could be accessed by users from another institution.
- Databases run with full transaction logging. Transaction logs are backed up every 3 hours and are held for at least 60 days, providing point-in-time restores for that duration. Full backups are taken weekly and are held for at least 60 days. The outside duration of the Recovery Point Objective is 3 hours, and the outside duration of the Recovery Time Objective is 12 hours (the RTO for most issues would be measured in seconds), depending upon the severity of the issue.
- Document stores are versioned and all versions are automatically replicated throughout the us-east-1 region, with near real-time replication to the us-west-2 region.

Infrastructure Layer

- Administrator-level permissions are closely controlled, and no generic accounts are ever permitted for server-level access.
- Audit logs are held for at least 1 year and are replicated nightly to off-site storage.
- Servers run recent versions of their operating systems (Microsoft Windows Server 2016) and the latest versions of the database servers (Microsoft SQL Server 2016).
- Servers are patched regularly every month and as necessary for critical 0-day exploits.
- Secure connections are brokered through Windows Domain accounts using NTLM authentications, and SQL authentication is never used or permitted, nor are passwords permitted to be stored within application code.
- Forest and domains run at the highest functional levels, with all insecure protocols and encryption algorithms disabled.
- Services run under limited-access accounts.
- No servers have publicly-routable addresses, with all public IPs held by the firewalls and load balancers and only specific ports routed to private IPs.
- Remote Desktop access is limited to the connections from within the VPN.
- VPN access requires two-factor authentication, where one factor is the password followed by a token, and the second factor is human-approved response from an authorized mobile phone.
- Group policies are employed to limit wireless and remote storage access.

Data Integration and Migration

Slate supports the bi-directional transfer of data between Slate and external systems, including student information systems such as PeopleSoft, Banner, Colleague, and Jenzabar, financial aid systems such as PowerFAIDS, search lists and score data files, and homegrown systems. Data integrations are achieved through several different mechanisms, enumerated below:

Data Export (Slate to an external system)

- Batched exports
These are built in the query tool and involve the generation of flat files (fixed-width, delimited, XML, JSON, etc.) on a scheduled frequency. Any code and value translations can be configured within Slate but outside of the query, so the query can be stable and immutable even when new entry terms, majors, and other code changes are introduced. This also ensures that the process on the campus system (e.g., SIS, ERP, etc.) side remains stable year-over-year, too. These exports can be cumulative, incremental, or differential. This differential option uses notification queues to track which records have changed since the export was last run, so full rows are returned for only the students for whom there has been some change to their record. This is typically the most appropriate option for exports to a campus system. The exports can be scheduled to occur on a daily frequency (or more frequently, as desired) and can be run on-demand for those instances throughout the year where you may need to update the campus system more immediately after adding/changing a batch of decisions. Exports can be pushed out to our SFTP servers or to a remote SFTP server. For exports to a campus system, we generally advocate for the use of batched exports, using delimited differential files, on a nightly overnight frequency, and to our SFTP server, where a school can then poll the /outgoing/ directory periodically to pull down and load any files. There are several major benefits to the batched export option. First, if exporting to our own SFTP server, we can ensure that it remains online/operational during the export. Second, there is the inherent logging of all exports that occurs just by preserving/archiving the exported files. This provides a great resource for troubleshooting if ever necessary. Third, the exports are scheduled to occur within a delivery window, but the particular execution time within that window (e.g., 2:00am until 4:00am) can be moved around based upon server maintenance activity and load. Fourth, we can provide automated email notifications upon successful, late, and/or failed generation and

delivery of scheduled exports. Fifth, if using a delimited file structure, depending upon the capabilities of your system, new fields may be added to the export without it breaking anything on the campus system end.

- Web services

The same query that would be built for a batched export can be made available as a web service at any time simply by enabling web services on the query. If a specific XML structure was desired, there would be some modifications to the query, but they would generally be reasonably minor. When coupled with notification queues, these would enable the school to poll the web service on a frequency that they define and pull down just the new/changed records each time. Web services are a fine and production-appropriate option, but they usually don't offer enough additional business value to outweigh the benefits offered by batched exports. Typically, the data is not so volatile and the business need to see that data reproduced in a campus system so great that frequent web service polling would even be necessary, so a batched export usually achieves all the business process requirements. Web services are also much more difficult to troubleshoot, should the need arise, since the request and response are transient.

- Other options

Batched exports can be utilized for a nightly feed and coupled with web services for an update/incremental feed of perhaps a limited set of data points, individual records could be requested using APIs or custom web services, or we could post data to a remote web service, so there exists an array of additional options, but 95% of all data integrations typically use the batched file approach.

Data Import (from an external system into Slate)

- Batched imports and data migrations

These are essentially the reverse of the batched export process, but configured and managed using different tools within Slate. Most frequently, the school delivers files to import to an /incoming/ directory on our SFTP server, which we poll frequently (at least once every 15 minutes) and load any files matching a specified filename mask. We can poll a remote SFTP server, too, but to the point of SFTP server availability, since we can ensure that our servers remain highly available, the experience is usually most reliable when using our infrastructure. These files can be delimited, fixed width, XML, etc., and we typically recommend that delimited files with column headers be used, since you can add/remove columns at any time without breaking the import process within Slate. This allows for asynchronous changes to the data feed specifications. The files are routed into our Upload Dataset tool, where the format can be predefined to handle all value and code translations, ensuring that the year-over-year changes to accommodate new fields or values is straightforward and can be handled by non-technical end users. This same Upload Dataset tool is used for importing data from search lists, score data files, and historical data migrations.

- Transactional web services

Web services can be created within Slate to update individual properties on individual records. These are appropriate for purely transactional events, but since they would execute synchronously, there could be some record locking while changes are committed. These also wouldn't be appropriate under high volume, since thousands of writes is not nearly as efficient as a single batched write to thousands of records. These typically require custom SQL, so their maintainability is not as straightforward.

- Batched web services (synchronous)

Like the transactional web services, an XML post could be submitted containing updates to be made to a lot of records. Since these would be executing synchronously for a group of records, the likelihood of record locking as changes are made and committed is greatly increased. These also typically require custom SQL, so maintainability is potentially an issue here.

- Batched web services (deferred)
This option provides a web service way to post files into Slate that are then processed by the Upload Dataset mechanism, just as if the files were transferred via SFTP. These could include XML posts but can also include delimited data. Since the updates are processed through our Upload Dataset mechanism, the changes can be queued, batched, and run in the most efficient manner possible which will minimize or eliminate any potential for observable record locking.
- Remote web services (scheduled)
Slate can also consume data from remote web services and, like pulling down a file from a remote SFTP server, can route the data into the Upload Dataset import system. There is a time and place for this option, but it's not frequently utilized.

Document Import

Document Imports should occur over SFTP, since a ZIP archive containing thousands of PDFs could potentially be quite large. Files are typically sent using a DIP file approach, wherein a ZIP archive is generated containing PDFs/TIFFs of the documents to be imported along with an index file containing the filename of each document and any associated metadata parameters (an SIS ID and document type, for example). Slate can then extract the documents and index file and import the documents onto the appropriate student records. Slate can also extract metadata from within a filename, so you could have files with an SIS ID and document code in the filename and obviate the need for an index file, but usually the DIP approach is best here. We always recommend encapsulating all of these documents into a ZIP file, since SFTP is much more efficient with the transmission of a single file (e.g., a ZIP archive) instead of with the transmission of thousands of individual files. We also prefer PDFs to TIFFs, since a digital PDF of non-scanned data would be a fraction of the size of a TIFF, since a TIFF is a rasterized/bitmapped image that won't contain any digital text content and thus cannot be enlarged beyond the original resolution without a loss of fidelity.

Document Export

Like document imports, Slate also supports the scheduled and on-demand export of any set of document types for any population of records. These are typically delivered in a ZIP archive to our SFTP servers.

Direct SQL access

We support direct SQL access from workstations/servers at the institution into their Slate database, but this is for ad hoc use only and is not intended for data integrations. This is for a few reasons. First, if the data integration exists entirely outside of Slate, Technolutions will not be aware of it and will not be able to proactively address the potential effects of schema changes. Second, direct SQL access is not schedulable on our end since the queries are being remotely initiated. Third, a poorly written SQL query could over-consume resources and create performance issues that are much more difficult to troubleshoot without visibility into what or how something was being used. Fourth, the access is all or nothing, so any user with direct SQL access has complete read-only access to the database.

Additional information is available upon request.

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Technolutions, Inc.
Response to
University of Wisconsin Whitewater
Standard Terms and Conditions

Limited Liability

Client acknowledges that Provider delivers a complex service that requires the cooperation and service of third-parties. The limit of Provider's liability in contract, tort (including gross negligence), by statute, or otherwise to Client concerning performance or non-performance in any manner related to this agreement, for any and all claims will not, in the aggregate, exceed the total fees paid by Client to Provider under this Agreement in the immediately preceding 6 months from the date the claim arose. In no event will Provider be liable for any lost profits, special, indirect, consequential, incidental or punitive damages.

Termination

Client may terminate Agreement or any Schedule with or without cause, at any time, by providing not less than sixty (60) days written notice to Provider. In the event of termination by Client in accordance with this subsection, Client will pay Provider any compensation due through the date of termination.

Insurance

A sample certificate of insurance which outlines Technolutions' insurance policies at the time of submission is attached. Technolutions does not perform any services on client campuses.

On-Site Visit

Since we do not have any field, marketing or sales staff, Technolutions will conduct the live demo and on-site vendor presentation remotely by conference call and screen share.

Intellectual Property Clarification

Technolutions hereby notifies and advises University of Wisconsin Whitewater that during the period of any license agreement between the parties, Technolutions maintains ownership of the Slate product and features, all of which are deemed to be proprietary information, including but not limited to, the design, functionality, code, programming, software, operating systems and any other work product that is not exclusive to any particular educational institution. Notwithstanding the foregoing, any and all data belonging to an institution, such as information regarding students, applicants, prospective students, faculty, staff, and alumni, shall remain the exclusive property of the University.

This is the standard language we request be added to all contracts:

INTELLECTUAL PROPERTY

- a. With respect to all Work Product which embodies or inherently requires the use or disclosure of Client's Confidential Information:
 - i. Provider will and hereby does assign to Client all of Provider's rights, title, and interest in and to all such Work Product, and to all Applications for Letters Patent and Applications for Copyright and for all Letters Patent and Copyrights granted thereupon covering all such Work Product, including, without limitation, all copyright and other proprietary rights thereto throughout the world (and all renewals and extensions thereof).
 - ii. Provider will promptly upon request by Client (at the sole expense of Client) execute, acknowledge, and deliver to Client such written instruments and do such other lawful acts as may be necessary in the opinion of Client and/or its Counsel, to obtain and maintain Letters of Patent or Copyright and to vest the entire right, title, and interest thereto in Client or in such subsidiary corporation as Client may designate.
 - iii. Provider hereby acknowledges and agrees that all works of authorship that are made by Provider (solely or jointly with others) within the scope of its consulting relationship with Client, are "WORKS MADE FOR HIRE" pursuant to §201(b) of the 1976 Copyright Act, and that all ownership of patent and/or copyright in such works shall vest entirely in Client. To the extent that the foregoing does not convey all rights in such works of authorship to Client, and in the event that the Work Product is not subject to copyright law, Provider agrees to assign, and does hereby assign to Client, all of Provider's entire right, title, and interest in and to all such Work Product and all copyrights, copyright registrations, patent applications filed, and patents granted thereon.

Provider expressly acknowledges that such Work Product will be or contain valuable and proprietary information of Client, and Provider agrees not to disclose the same to any third party without the prior written permission of Client, or to use any such items to create any other services either for its own use, for the benefit of others, or otherwise.

- b. With respect to all Work Product which does not embody or inherently require the use or disclosure of Client's Confidential Information or may be cleansed of Client's Confidential Information, trademarks, service marks, and trade dress:

- i. Provider will and hereby does assign and grant to Client the world-wide, royalty-free right, for the duration of Agreement, to use all such Work Product and authorize others to do any or all of the foregoing on Client's behalf.
- ii. Client hereby acknowledges and agrees that Provider shall, subject to the license set forth above, retain all rights to such Work Product and that all works of authorship, included in the such Work Product , shall not be considered "WORKS MADE FOR HIRE" pursuant to §201(b) of the 1976 Copyright Act, and that all ownership of patent and/or copyright in such works shall vest entirely in Provider and may be licensed and distributed at the discretion of Provider, provided, that, in no event shall Provider have any rights whatsoever in Client's Confidential Information (including, without limitation, no right to use, disclose, license, or otherwise distribute Client's Confidential Information) or any right to use, disclose, license, or otherwise distribute any materials that include the name, trademark, service mark, trade dress, or other indicia of source of Client.

Accepted Forms of Payment

Technolutions accepts payment via check or ACH deposit only.

Terms and Conditions

We request that Technolutions' service agreement take precedence over the terms and conditions.



RESPONSE TO REQUEST FOR PROPOSAL

To University of Wisconsin Whitewater

Cost Proposal

From Technolutions

Lisa Dabkowski
slate-proposals@technolutions.com

Cost Proposal Form: Comprehensive Vendor Hosted Solution (200 Points)

UNIVERSITY OF WISCONSIN – WHITEWATER

RFP #UN-J-0004

The University of Wisconsin-Whitewater would like to understand the total cost of ownership involved with the proposed solution, including one-time, recurring costs for services, etc. Provide pricing for the proposed system in the format as presented. All hardware, software, or other related cost including both recurring and non-recurring costs should be identified on the price sheet(s).

Otherwise, UW-Whitewater will assume the feature to be a standard part of the proposed solution, and the feature will be provided at no additional cost. A five-year total of purchase, installation and training, maintenance costs, etc. will be compared to determine the best value for the University.

In formulating your responses, UW-Whitewater is a public, non-profit institution for higher education. Any discounts or special pricing offered to similar institutions, or under similar circumstances, should be extended to the University.

Below you will find the cost proposal forms for a vendor hosted solution. In your response, please complete the form(s) related to the applicable option(s) your organization is proposing. For more information on background, please reference section 1.1 of the main RFP#UN-J-0004 document.

Required Costs:							
Item	Itemized Description	Cost					
		Year #1	Year #2	Year #3	Year #4	Year #5	Total
One-time costs (please list and itemize).	<i>Please see cost information below.</i>						\$ -
Recurring costs - please list and itemize costs and frequency of costs, such as, annual license fees, maintenance, etc. Please provide a breakdown of the costs and how they are calculated.	<i>Please see cost information below.</i>						-
Storage and Archiving Costs (list and itemize)	<i>Included in license. Please see cost information below.</i>						-
Required hardware and software (if not included, list and itemize)	<i>Please see cost information below. There are no hardware requirements.</i>						-
Total Required Costs Per Year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Cost Proposal Form: Comprehensive Vendor Hosted Solution (200 Points)

UNIVERSITY OF WISCONSIN – WHITEWATER

RFP #UN-J-0004

<u>Add-On/Other Costs:</u>							
Item	Itemized Description	Cost					
		Year #1	Year #2	Year #3	Year #4	Year #5	Total
<u>Other costs associated with 1-5 below:</u> NOTE: If software/product add-ons are required to be purchased in order to perform any of the below items, please provide those additional details and costs.							
1) SMS/Text Messaging functions	<i>Please see cost information below.</i>						\$ -
2) Email functions	<i>Included in license. Please see cost information below.</i>						-
3) Address verify function	<i>Included in license. Please see cost information below.</i>						-
4) Test Environment	<i>Included in license. Please see cost information below.</i>						-
5) Other	<i>Please see cost information below.</i>						-
Other recommended but not required add-ons that you have included in this proposal (list and itemize cost).	<i>Please see cost information below.</i>						-
Training costs - please describe all costs associated with training UW-Whitewater staff on the CRM tool.	<i>Varies. Please see cost information below.</i>						-
All other services, including consulting, per hour, etc (list and itemize cost).	<i>Please see cost information below.</i>						-
List and describe any other costs not mentioned above.	<i>Please see cost information below.</i>						-
Total Add-On/Other Costs Per Year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Cost Proposal Form: Comprehensive Vendor Hosted Solution (200 Points)

UNIVERSITY OF WISCONSIN – WHITEWATER

RFP #UN-J-0004

Summary of Costs:						
	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>	<u>Total Cost</u>
Required Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Add-On/Other Costs	-	-	-	-	-	-
Grand Totals	\$ <i>Please see cost information below.</i>			\$ -	\$ -	\$ -

All licenses to Slate are comprehensive and include access to all admissions features, functionality, service, support, design, and development, without limitation or restriction. There are no per-user or per-application fees or restrictions, and there are no separate implementation fees. All data migrations and integrations are included as part of the annual subscription. Only four types of costs fall outside of the annual license: 1) any payment processing fees charged by third parties, 2) nominal telecommunications and media fees charged by third parties, such as a one-penny-per text charged by telecommunications carriers for sending domestic SMS messages, 3) the registration cost for attending optional events such as the Slate Innovation Summit and any associated travel expenses, and 4) travel expenses for staff to attend Launchpad, the four-day training event (there is no fee charged for the event itself for up to three participants).

The following rate table provides the total annual costs for a single database and license, and the tier is based upon the total number of submitted applications that an institution receives annually:

- < 1500: \$30,000
- 1500–7500: \$50,000
- 7500–15000: \$75,000
- 15000–40000: \$100,000
- 40000–60000: \$125,000
- 60000–80000: \$150,000
- 80000–100000: \$175,000

Institutions typically elect to implement and support multiple programs independently, such as separating undergraduate and graduate admissions. In such a case, the license costs for each program would be determined by its respective application volume.

It is also possible to purchase a database with the functionality enabled for both admissions and advancement, which would be supported by a centralized team on your campus. If your institution would be interested in learning the cost for this option, please let Technolutions know your total full-time undergraduate enrollment.