

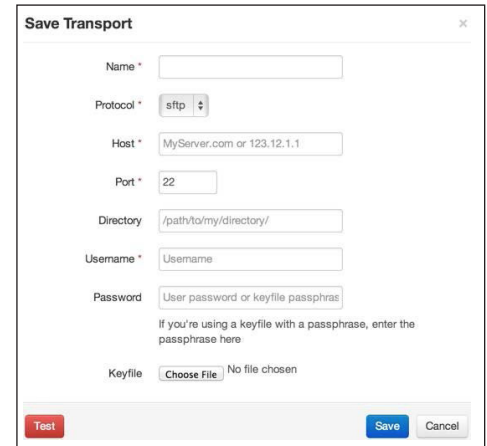
EMP AUTOMATED DATA TRANSFER SETUP GUIDE

This guide is designed to help you plan and implement an automated data transfer between the EMP and any other database.

STEP 1: SETUP EMP TRANSPORTS

The first step in setting up an automated data transfer is to setup one or more transports in the EMP. A transport is a FTP/SFTP destination that the EMP will pickup an import file from or send an export file to.

It is recommended to setup one transport for each automated export/import being used to keep files separated. You can have multiple transports use the same FTP/SFTP login credentials, but specifying different directories (folders) to store files in. The transport settings can be found under the 'EMP Settings' link from the 'Account' tab.



Save Transport

Name *

Protocol *

Host *

Port *

Directory

Username *

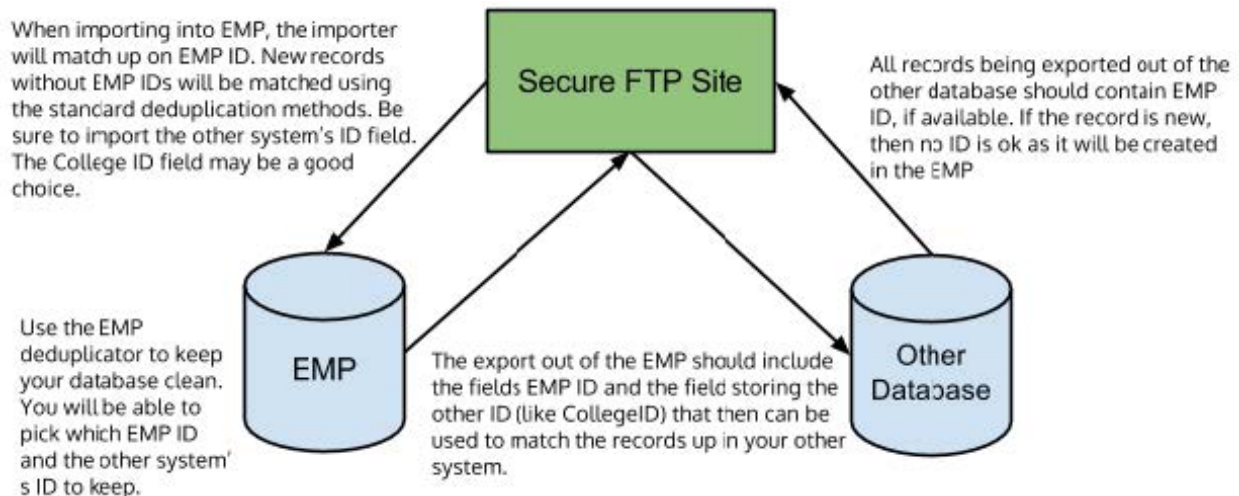
Password
If you're using a keyfile with a passphrase, enter the passphrase here

Keyfile No file chosen

STEP 2: PICK DATA TRANSFER PLAN

Method 1: Two way sync based on IDs

Summary: This is the recommended way to sync data. By having 2 ID numbers for each student (EMP ID and other system's ID), when importing/updating, all records will be matched correctly.



Pros:

- Most accurate, will not create duplicate records if records are being matched by ID numbers
- Data will be correct in both systems
- Student data can be edited in either system, and have that info reflected in the other

Cons:

- Most complex
- Takes more time to setup

Method 2: One way to EMP

Summary: Only import data into EMP, without EMP IDs

When importing into EMP the importer will match records will be matched using the standard deduplication methods.



Use the EMP deduplicator to keep your database clean.

Pros:

- Easy to implement
- Keeps records in EMP updated with correct stages

Cons:

- This is only effective if you are using the other system as the main CRM/record database. Any information collected by the EMP will not be reflected in your other system automatically
- Not using EMP ID to dedupe records may cause duplicates if their record's data is changed significantly in the other database

Method 3: One way to other system

Summary: Send data from EMP to your other system



Use the EMP deduplicator to keep your database clean.

Pros:

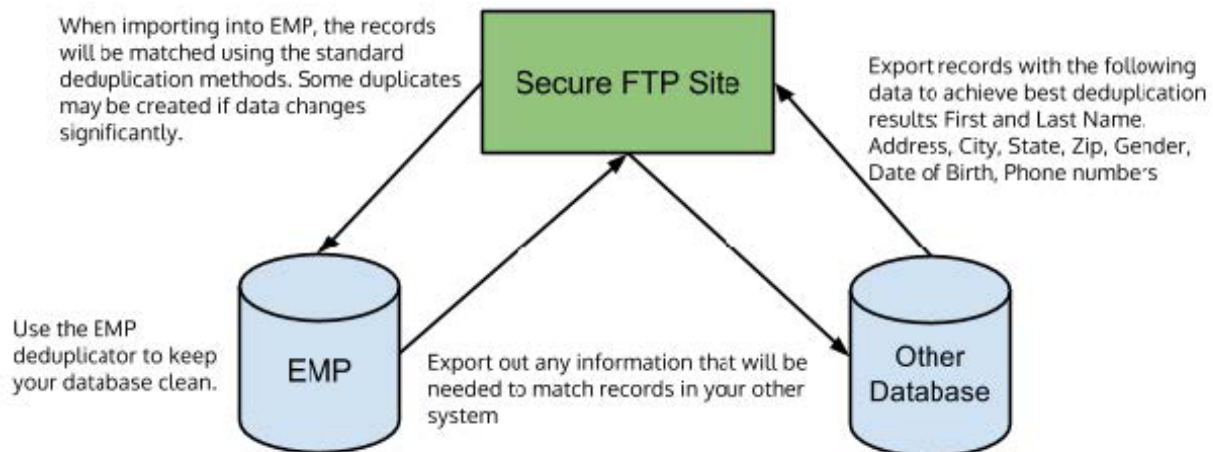
- Any information collected by the EMP will be sent to your other database
- Very easy to implement in the EMP

Cons:

- Possibly very difficult to find, match, and update records in your other system depending on the specific implementation
- Any updates made in the other system will not be reflected in the EMP automatically (manual imports required)

Method 4: Two way sync without IDs

Summary: Transfer data to and from EMP and other system without the use of IDs to match records.



Pros:

- Data will be correct in both systems
- Student data can be edited in either system, and have that info reflected in the other

Cons:

- More complex than one way exchange
- High chance of creating duplicates in both systems
- Possibly very difficult to find, match, and update records in your other system depending on the specific implementation

STEP 3: IMPLEMENT

Once a data transfer method is decided upon, it is time to implement. These are the steps that would need to be taken to fully setup Method 1:

1. Make sure you have access to a SFTP account.
 - a. It is strongly advised NOT to use non-secured FTP accounts for any student data transfers
2. Setup Transports needed in the EMP
 - a. See the beginning of this guide for more details
3. Setup an export out of your other system to the SFTP
 - a. The exported file needs to go into the same location as the transport that will be used for the next step of EMP importing
 - b. The EMP needs a file to setup the automated import, so run the export at least once before continuing
4. Setup EMP automated import
 - a. See <https://www.spectrumemp.com/help/view/296>, <https://www.spectrumemp.com/help/view/233>, <https://www.spectrumemp.com/help/view/209>, and <https://www.spectrumemp.com/help/view/207> for more details on how to setup
5. Setup EMP automated export
 - a. See <https://www.spectrumemp.com/help/view/206> for more details
6. Setup automated import process for your other system using file delivered to SFTP by the EMP
 - a. At this point, the EMP file should contain your other systems ID number for easy record matching

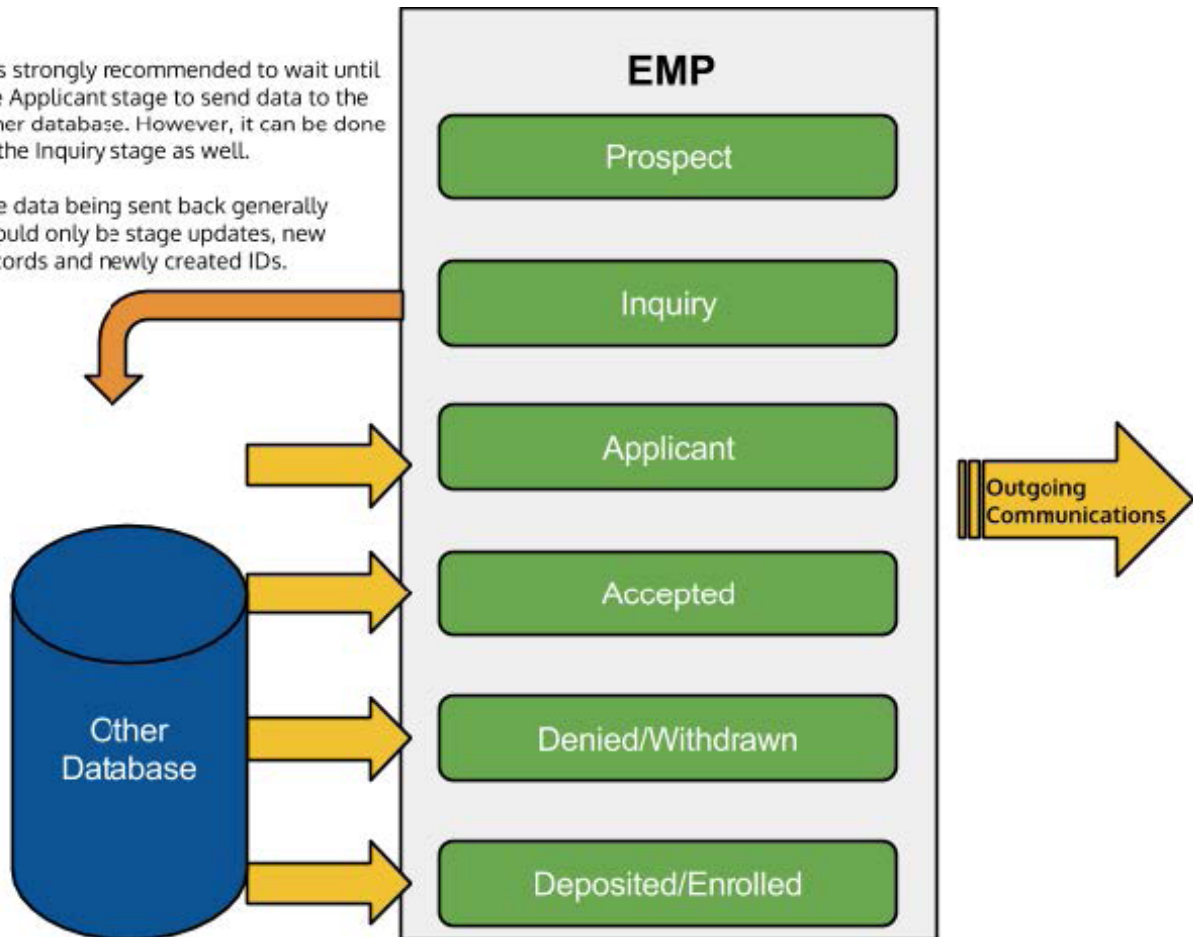
It is recommended to follow these steps in this order.

BEST PRACTICES

The best practice to implement this plan is to use the data exchange described in Method 1 and to transfer data according to the below diagram:

It is strongly recommended to wait until the Applicant stage to send data to the other database. However, it can be done at the Inquiry stage as well.

The data being sent back generally should only be stage updates, new records and newly created IDs.



DATA FIELDS

An important question for any data transfer setup is the actual data fields themselves. While every situation is unique, below is a listing of recommended fields for common implementations.

Required Fields:

- First Name
- Last Name
- State (Prospect, Inquiry, Applicant, etc)
- Entry Term/Year
- One of: mailing address, email, phone number(s). If a record does not have any of these fields, it is recommended not to import them.
- Any fields that are used for Representative Assignments. These fields will be dependent on what criteria your institution uses to assign territory. Common fields used are: State, Zip, Last Name, Major/Program/Degree Type, Student Type (International, Transfer, etc).

In addition to the Required Fields, there are other fields that should be loaded into the EMP depending on how you plan to use the EMP.

Use case 1: EMP is system of record (i.e. being used as primary CRM)

What should be sent to EMP:

- All of the 'Required Fields' defined above
- Any other fields that are available and relevant. Since this is the system of record, the more data the better.

Use case 2: EMP is not that system of record (being used for Marketing Automation)

What should be sent to EMP:

- All of the 'Required Fields' defined above
- Fields related to marketing. This will depend on the types of campaigns being run, but in general the following are useful:
 - Demographics (Gender, Birthday, etc.)
 - Interests (Major/Program, extracurricular activities, etc.)
 - Test score information
 - Scoring/Profiling Information (if available)
 - Other fields/information that are being used for marketing campaigns