



OnboardConnect

by Zentrosoft · For Slate CRM institutions

Connect enrollment to access.

Turn Slate records into ready student accounts across Active Directory, Microsoft Entra ID and Google Workspace, keep your SIS and Slate in sync, and give IT a clear view of every record, in visual workflows your team builds once.

[Request a 90-day trial](#) ↗

onboardconnectapp.com/request-access
No credit card required

PROVISION RULES

Account standards, set once.

- ✓ Usernames from names and student ID
- ✓ Five ways to resolve duplicate usernames
- ✓ Long names fit the 20-character AD limit
- ✓ One password policy, self-service too
- ✓ Group and list rules by any Slate field

Every workflow applies them the same way, across AD, Entra ID and Google.

3

directory platforms

Active Directory, Entra ID, Google Workspace

0

inbound firewall rules

The campus agent connects outbound only

AES-256

encrypted secrets

Stored credentials encrypted with AES-256-GCM

4

SIS platforms

Banner, Colleague, PeopleSoft and Workday

WORKS WITH THE SYSTEMS YOUR CAMPUS ALREADY RUNS

S

Slate CRM

Query · Source Format

A

Active Directory

Through the OC Agent

M

Microsoft Entra ID

Microsoft Graph

G

Google Workspace

Google Admin SDK

E

Ellucian Banner

Ellucian Ethos

E

Ellucian Colleague

Ellucian Ethos

O

Oracle PeopleSoft

Campus Solutions

W

Workday Student

SIS read & upsert

S

SQL Server

Read & write tables

N

Notifications

Email · SMS · Slack · Teams

WHY INSTITUTIONS CHOOSE ONBOARDCONNECT

✓ Accounts ready on time

Students admitted in Slate get their accounts on the next scheduled run, with no ticket queue.

✓ Built around your rules

Usernames, passwords, groups and lists come from rules you set once, not from scripts.

✓ A clear view of every record

Each run lists every student with Created, Updated or Error and the reason, in the portal and by email.

HOW IT WORKS

1

Connect

Point OnboardConnect at your Slate query and your directories. Install the agent once for on-campus systems.



2

Build

Drag the steps your process needs into a workflow and set your username, password and group rules.



3

Run

Workflows run on your schedule. Every run is logged with a result for each student.



WHAT IT DOES

One platform for the whole student account lifecycle

1 Slate connection

Read students from Query Web Services, write results back through a Source Format, and move files to and from Slate over HTTPS, with no SFTP.

2 Three directory platforms

Create, update, activate, disable and delete accounts; set passwords; manage security groups, distribution lists (AD), OU placement and Microsoft 365 licenses.

3 Visual workflow builder

Drag-and-drop steps with On Success / On Failure lanes, filters, field transforms and timed waits. A record that fails is set aside and the rest complete.

4 Rules instead of scripts

Username formats with live preview, five duplicate-name strategies, long names shortened to fit AD, plus password, group and list rules.

5 SIS & SQL Server

Read and update student records through Ellucian Ethos (Banner, Colleague), PeopleSoft or Workday, and read or write SQL Server tables, with no text files.

6 Help desk & self-service

A configurable directory search for IT staff, and an optional branded password-reset portal for students with codes by email or SMS.

BEFORE AND AFTER

What changes for IT and admissions

WITHOUT ONBOARDCONNECT

✗ Accounts are created by hand from exports or tickets

✗ Scripts and spreadsheets decide usernames, OUs and groups

✗ Student data sits in text files on shared drives

✗ Nobody is sure which students failed, or why

✗ Password resets fill the help-desk queue

✗ Slate and the SIS drift out of sync

WITH ONBOARDCONNECT

✓ Accounts are built automatically from Slate on the schedule you choose

✓ Rules you configure once apply the same way to every student

✓ Records move between Slate, your SIS and SQL Server without files

✓ Every run reports each student by name: Created, Updated or Error

✓ Students reset their own passwords; IT keeps the policy and the reset log

✓ Workflows write new usernames back to Slate, and to the SIS through Ethos

WHO IT IS FOR

IT & identity teams

Stop building accounts by hand; keep directory rules in one place.

Admissions & enrollment

Admitted students get access on time, with Slate kept current.

Registrar & SIS teams

Records move into the SIS without files or re-keying.

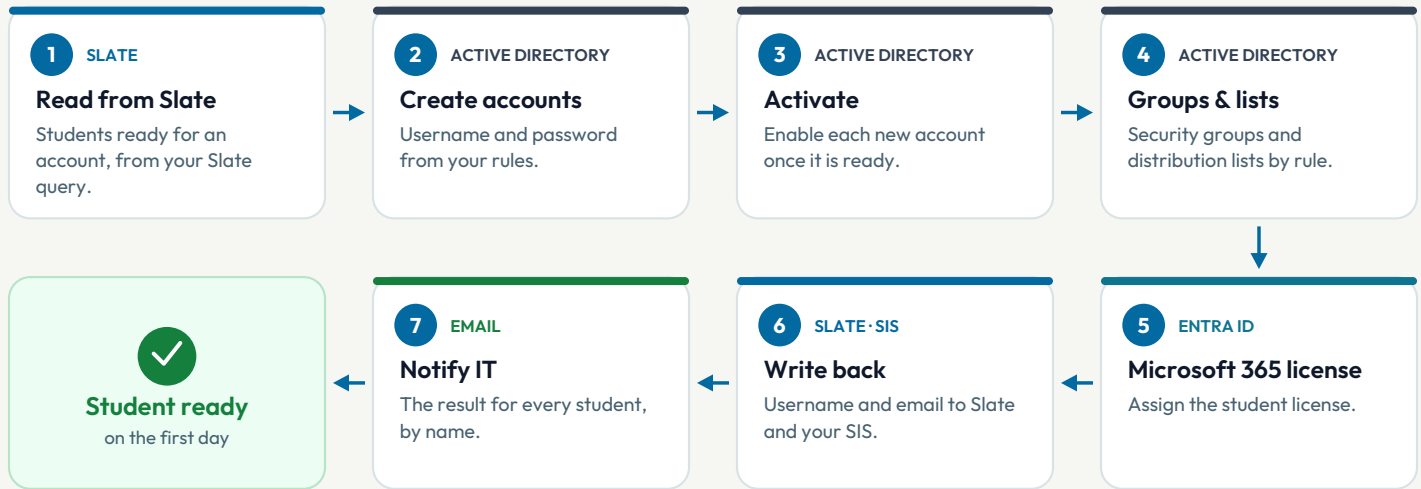
Help desk

Fewer password tickets and a clear record of every account change.

SAMPLE FLOW

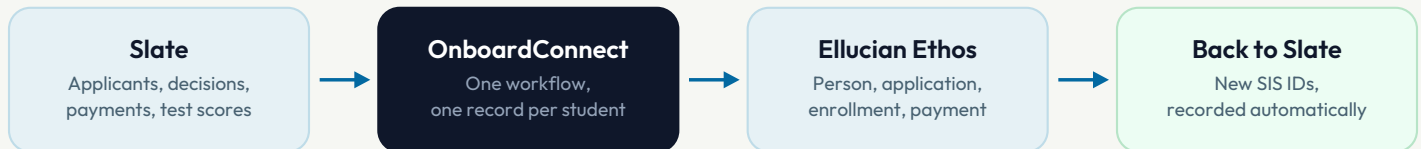
A student onboarding workflow

Runs on your schedule or on demand



SAMPLE FLOW

Slate to your SIS, without text files



Each section reads its records from Slate, writes them to the SIS, and every new ID is sent back to Slate in one step. A record without the data for a step, or already sent on an earlier run, is skipped rather than failed, so the rest of the run completes.



SAMPLE RUN RESULTS

What every run shows you

STUDENT	USERNAME	RESULT	DETAILS
Jordan Rivera	jrivera482917	Created	—
Amara Okafor	aokafor551023	Created	—
Lucas Chen	lchen309871	Updated	Already had an account; details refreshed
Priya Nair	—	Error	Create accounts: another account already uses this sign-in name. Later steps skipped.

Illustrative example. Results appear in the portal and in the email sent to your team after each run.



INTEGRATIONS

How OnboardConnect connects

SYSTEM	HOW IT CONNECTS	WHAT YOU CAN DO
Slate CRM	Query Web Services and Source Format, over HTTPS	Read students; write results back; transfer files
Active Directory	OC Agent on a campus Windows or Linux server (outbound only)	Accounts, passwords, groups, lists, OU placement
Microsoft Entra ID	Microsoft Graph	Accounts, passwords, security groups, Microsoft 365 licenses
Google Workspace	Google Admin SDK	Accounts, suspend, passwords, groups
SIS (Ethos, PeopleSoft, Workday)	Through the OC Agent; SIS credentials stay on campus	SIS Read and SIS Upsert
Microsoft SQL Server	Through the OC Agent; Windows or SQL sign-in	Read, create, update and delete rows
Notifications	Email, SMS (Twilio), Slack or Microsoft Teams, webhooks	Per-student results and alerts

SECURITY & HOSTING

Cloud-hosted, with directory access kept on campus

**Hosted on Cloudflare**

Serverless on Cloudflare's global network: nothing for you to host or patch.

**No inbound ports**

The OC Agent connects out over an encrypted link; no inbound firewall rules.

**Isolated per institution**

Each institution's data is kept separate; a dedicated database is available.

**Backups**

Databases backed up every 6 hours and kept for 30 days.

**Encrypted**

TLS everywhere; stored credentials encrypted with AES-256-GCM.

**Accountable**

Every action logged with who did it; role-based access and single sign-on.

Pricing

Priced by enrolled student headcount. Every plan includes the full platform: no modules to buy and no per-user fees. Annual invoicing.

Onboarding & support

Our team helps connect your systems and build your first workflow during the trial, with a dedicated contact as you go live.

GETTING STARTED

Start a 90-day trial

- 1 Connect Slate and your directories
- 2 Build your first workflow with our team
- 3 Validate with test records, then go live

[Request a trial ↗](#)

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