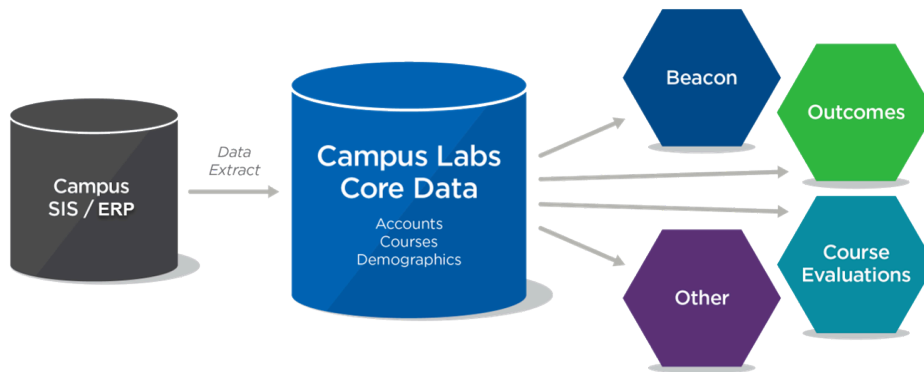


Core Data Implementation Guide

Overview

This document serves as an overview of the steps that are necessary for the successful implementation of [Core Data](#) at your institution. Your institution will be provided a Core Data implementation team consisting of a Consultant and a Technical Services Specialist.



Campus Labs Core Data Team Members:

Consultant - Your consultant is responsible for helping you stay on track during your implementation process. They will be your main point of contact during and after implementation.

Technical Implementation Specialist - Your technical implementation specialist will explain all the Core Data files as well as help your institution set up your data exchange method.

Your Campus Labs Implementation team will facilitate this process and help keep your institution on target with your Core Data set up and launch. At each step of the process, your implementation team will be available to answer any additional questions as they arise. If you are unsure who to direct a question to, email your consultant and they will pass your question along to the right person.

Implementation of Core Data on average takes 6 to 10 weeks. The length of implementation may vary depending on the amount of time it takes your institution to complete each step. The basic steps in the implementation process are:



****Authentication MUST** be complete before Core Data can be implemented.

Identify an Institution Data Manager

This role will be responsible for acquiring the required institutional data and transferring it to Campus Labs. They will be the primary campus contact for the Campus Labs Technical Implementation team. The person in this role must have a thorough understanding of the selected exchange type (API, sFTP, or manual) as well as have access and familiarity with the SIS or other source system which data will be extracted from.

This role will also be responsible for communicating risks from the campus to the Campus Labs team. This would include any risk or change to the expected timeline, and any relevant information that could affect the success of the implementation. Once you have identified a Data Manager please be sure to inform your consultant of this person and pass this implementation guide on to them.

Discovery and Overview of Files

Once you have identified an institution Data Manager the next step in the implementation process of Core Data is for the Implementation team to provide your product Site Administrator(s) and your Data Manager with specific information about each of the Core Data files. That information is provided via an online live training with your implementation team. Your institution's consultant will arrange this Core Data call after authentication has been completed.

During this approximately hour long call your implementation team will talk to you about:

Core Data files

- » Accounts
- » Courses
- » Demographics

Data exchange methods

- » API
- » Manual File Uploads
- » Secure File Transport Protocol (sFTP)

Core Data - Accounts

Account data is the most basic information that the platform requires in order to identify a user and tie information to them. This information is used to customize the user experience of the web application, and enable communication directly to the user in specific conditions.

Accounts must be sent and uploaded **BEFORE any other data is sent to Campus Labs.

Discovery and Overview of Files, cont.

Core Data - Courses

To allow insightful application of assessment data for teaching and learning and outcomes-based program improvement, the platform collects course catalog and enrollment data. Not all files are required.

[Organizational Units](#) - The Organizational Unit import is used to create the structure of your institution.

[Terms](#) - The Terms import, is used to create the structure of a campus annual schedule.

[Courses](#) - The Courses import is used to create a campus course catalog.

[Sections](#) - The Sections import is used to associate course offerings to the courses in the course catalog. It will also be used to attach students and instructors to a course offering during a term.

[Enrollments](#) - The Enrollment import is used to enroll students into the individual sections offered for the term.

[Instructors](#) - The Instructors import is used to enroll instructors into the individual sections offered for the term.

[Attributes](#) - The Attributes import is used to “tag” course sections.

[Remove instructor](#) - The Remove Instructor import is used to remove instructors from a course section.

[Academic Programs](#) - The Academic Programs file is used to define these programs on your campus in the Outcomes tool.

Core Data - Demographics

In order to present interesting data visualizations, generate logical filtering, and create rules-based actions within the platform, several pieces of demographic and academic data points are required to be sent to Campus Labs.

There are two types of Demographic Imports:

- » Faculty (69 available data points)
- » Students (126 available data points)

Core Data Exchange Methods

Due to the importance of the core data elements for the platform and the highly varied technical capabilities of each higher education institution, Campus Labs supports the following methods to transmit the core data sets. A single method should be determined for all three elements of the core data exchange (i.e. do not mix methods).

[Web service and API Endpoints](#)

A more advanced method, requiring proficient campus IT professionals, which allows both bulk and individual field loading of data to the platform via secure, scheduled transactions over the internet. Each data type endpoint offers the ability to create, retrieve, and update the data. This additional, fine toothed control of each data type offers institutions ultimate flexibility in the delivery and management of core data in the platform. To use this method the file size needs to be 4 megabytes or smaller.

[Secure File Transport Protocol \(SFTP\)](#)

Scheduled file import via Secure File Transport Protocol (sFTP) Allows institutions to send large data sets to the platform by saving .CSV “flat” files containing data for Accounts, Demographics and Courses into a Campus Labs hosted directory via a sFTP connection. The institution must provide the data in the file format indicated by Campus Labs along with a manifest file (.done file) which indicates to the platform that the data file is complete and ready to be imported. Once the data and manifest files are saved to the directory, the platform processes the file and incorporates the information into its data set. Any errors are displayed via a web interface accessible by the Campus Data Manager.

[Manual File Uploads](#)

This method requires a user to import the data via a web interface (Data Management site). This method is the most limited in terms of flexibility and is generally reserved as a last resort if the more robust options are not possible. To use this method the file size needs to be 4 megabytes or smaller.

Setting Up Your Core Data Exchange Method

Once you have chosen your data exchange method your technical implementation specialist will work with you to set up the method. You can find detailed instructions on how to use each of the methods by following the hyperlinks above.

Core Data Exchange

As you are putting your files together you can feel free to ask questions to your technical implementation specialist via a support ticket. The support ticket will be opened after your Core Data call.

Technical check of your files

Once you have completed compiling the files your technical implementation specialist will review them before you import them into your production site. They will check to be sure your header rows are correct as well as be sure the data you have populated in each column meets the requirements. Feedback will be provided via your open support ticket.

Importing files into the production site

Once your files have been reviewed by your technical implementation specialist you will then be given the OK to import your files into your production site. At this time, you will be given the login information to your Management site.

Addressing Errors

After a file has been imported that file will receive one of four status within your Management site:

In Progress – The file is still processing

Staged – The file is in the final stages of processing

Complete – The file has been imported without any errors

Complete with Data Issues – The file has been imported but there are errors with one or more of the rows. Those rows with errors have not been imported.

Within the Management site, an error report will be available to you. Log in to view your errors and reimport files to correct them.

Timeline

This table is meant to give you an approximate timeline in working days for each piece of the Core Data implementation.

The duration times are based on previous implementations. These numbers may vary for your institution.

Core Data Steps	Duration
Total Core Data Timeline	40 days
Schedule Core Data call	4 days
Core Data Discovery call	1 day
Campus prepares Core Data files	20 days
Validate files	3 days
Edits/Corrections to files	3 days
Upload/Error review	2 days
Set up SFTP	4 days
Debrief and transition to Consultant	3 days