



OnboardConnect

by Zentrosoft · For Slate CRM institutions

Connect your campus to access.

Turn Slate records and staff and faculty requests into ready 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 RULE SETS

Account standards, set once.

- ✓ A set each for students, staff and faculty
- ✓ Five ways to resolve duplicate usernames
- ✓ Long names fit the 20-character AD limit
- ✓ Your password policy, or the directory's
- ✓ Group and list rules on any record field
- ✓ OU placement from a field such as role

A workflow step can pick the set from a field such as role, across AD, Entra ID and Google.

3

directory platforms

Active Directory, Entra ID, Google Workspace

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inbound firewall rules

The campus agent connects outbound only

3

campus populations

Students, staff and faculty, each with its own rules

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

I

Internal Forms

Forms · CSV imports

E

Ellucian Ethos

Banner · Colleague

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

Admitted students on the next scheduled run; new staff as soon as their form is submitted.

✓ Built around your rules

Usernames, passwords, OUs and groups come from a rule set for each population, not scripts.

✓ A clear view of every record

Each run lists every person 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, internal forms and directories. Install the agent once for on-campus systems.

→ 2 Build

Drag the steps your process needs into a workflow and set the rule set for each population.

→ 3 Run

Workflows run on your schedule or on each new form entry. Every run logs a result for each person.



WHAT IT DOES

One platform for student, staff and faculty accounts

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.

2 Staff & faculty requests

Departments or HR fill in an internal form or import a CSV. Each submission is tracked, can start a workflow and gets the outcome back.

3 Three directory platforms

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

4 Rule sets per population

Students, staff and faculty each get a username format, duplicate-name handling, UPN domain, password policy and group rules.

5 OUs and groups by field

Place people in an AD OU from a field such as role, move them between OUs, and name groups from a field, e.g. per department.

6 Visual workflow builder

Drag-and-drop steps with success and failure lanes, filters, transforms and timed waits. A failed record is set aside; the rest complete.

7 SIS & SQL Server

Read and update records through Ellucian Ethos (Banner, Colleague), PeopleSoft or Workday, and read or write SQL Server tables.

8 Help desk & self-service

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

BEFORE AND AFTER

What changes for IT, admissions and HR

WITHOUT ONBOARDCONNECT

- ✗ Accounts are created by hand from exports or tickets
- ✗ New-hire requests arrive by email and spreadsheet
- ✗ Scripts decide usernames, OUs and groups
- ✗ Nobody is sure which accounts failed, or why
- ✗ Password resets fill the help-desk queue
- ✗ Slate and the SIS drift out of sync

WITH ONBOARDCONNECT

- ✓ Accounts built automatically from Slate, forms and imports
- ✓ Departments submit a form, tracked with its history
- ✓ One rule set per population, applied every time
- ✓ Each person listed by name: Created, Updated or Error
- ✓ Self-service resets; IT keeps the policy and the log
- ✓ Usernames written back to Slate; SIS records updated via Ethos

WHO IT IS FOR

IT & identity teams

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

Admissions & HR

Admitted students, new staff and faculty get access on time.

Registrar & SIS teams

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

Help desk

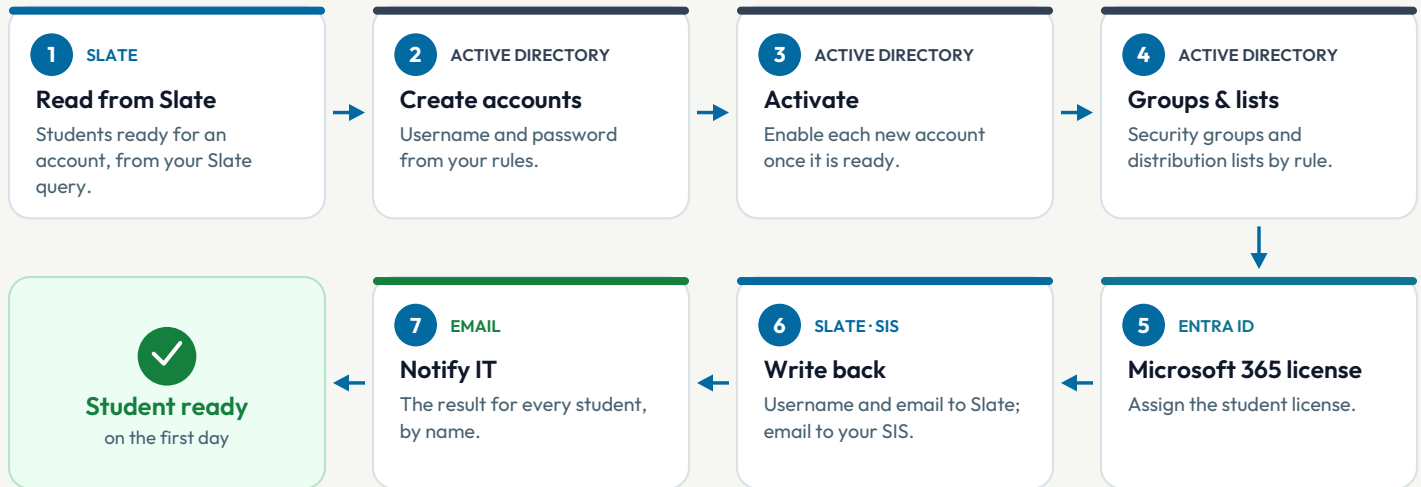
Fewer password tickets and a clear record of every account change.



SAMPLE FLOW

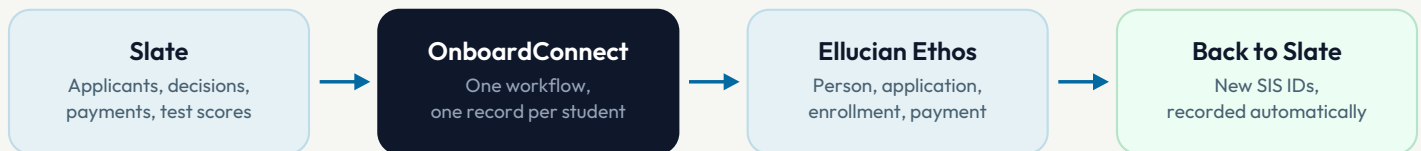
A student onboarding workflow

Runs on your schedule or on demand



SAMPLE FLOW

Slate to your SIS, without text files



Every new SIS ID goes back to Slate in one step. A record missing the data for a step, or already sent, is skipped, so the run completes.

SAMPLE FLOW

Staff and faculty, from an internal form



Slate stays the student source; staff data comes from forms, imports or a SIS or SQL Server read. Move OU handles role changes.

SAMPLE RUN RESULTS

What every run shows you

STUDENT	USERNAME	RESULT	DETAILS
Jordan Rivera	jrivera482917	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 back; transfer files
Internal Forms	Built into the portal: fill in a form or import a CSV	Staff and faculty account requests
Active Directory	OC Agent on a campus Windows or Linux server (outbound only)	Accounts, passwords, groups, lists, OUs
Microsoft Entra ID	Microsoft Graph	Accounts, passwords, groups, M365 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-person 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, your forms 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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