

# EZLink Data Exchange Module

## Description

EZLink provides Relatrix customers with a scripted method of keeping user data in their Online Contact Center (OCC) up-to-date with new and updated Parent/Guardian data from their Student Information System (SIS), staff directory or other User Data Source (UDS). EZLink is intended to serve as a single-direction (UDS to OCC) process, and does not send any data updated in the OCC back to the UDS.

Relatrix' user-centric database allows any website visitor to register and update their profile. With specific regard to a Student Information System data source, users in Relatrix' OCC database do not have a 1:1 relationship with Students in the SIS. Rather than creating one user record for each student and using the contact information on their SIS record, Relatrix uses the Parent/Guardian contact names and creates a user record for each; giving each Parent/Guardian an independent set of contact details and preferences that they can manage through their OCC account.

Additionally, EZLink will assign a school relationship to each user record to associate them with the school(s) that their child(ren) attend. This means that the number of users created from EZLink will be larger than the total student enrollment in the customer's district.

EZLink requires that the customer generate an import file of UDS contact data, based on the format specified in this document, on a periodic basis (nightly or weekly), and upload that file to Relatrix using a secure FTP service. The EZLink process will execute nightly and use the provided import file (if uploaded) to update or add specific user records in the customer's OCC.

## Record Format

The data being imported from the customer's UDS should include any new, updated or deleted user records. The record format includes the following fields:

**\*Username** – If this field is blank EZLink will output the data record to the exceptions file. Relatrix recommends using the UserID (same value in the UDF2 field), or the Primary Email for the User as the Username.

**\*First Name** – User First Name. If this field is blank EZLink will output the data record to the exceptions file

**Middle Name** – User Middle Name or Initial

**\*Last Name** – User Last Name. If this field is blank EZLink will place the data

record to the exceptions file.

**Primary Email** – User Primary Email address

**Secondary Email** – User second email address

**Address** – User home address

**City** – User home city

**State/Province** – User home state. This should be the two letter postal abbreviation for the state (e.g. - CO for Colorado)

**Zip/Postal Code** – Parent/Guardian home ZIP

**\*Home Phone** – User home phone # (format: 111-111-1111) for voice notification, and for constructing the username of a new user. If this field is blank EZLink will place the data record to the exceptions file.

*(Note: If user does not have a landline home phone number we recommend populating the Home Phone with the Mobile Phone in the import record.)*

**Work Phone** – User business/work phone # for voice notification. No extensions allowed (format: 222-222-2222).

**Mobile Phone** – User mobile phone # (format: 333-333-3333) for voice notification

**Smartphone/PDA** – User Smartphone/PDA # for SMS/text notification. (format: 333-333-3333)

*(Note: EZLink will NOT use the Mobile Phone field for SMS/text notification. The Smartphone/PDA field must be populated to send SMS/text messages, even if it is the same number as the Mobile Phone field.)*

**School Name** – School/location where user is going to be assigned a relationship with this data record.

**\*UDF 1** – School/location ID from your UDS, where the user is going to be assigned a relationship with this data record. If this field is blank EZLink will output the data record to the exceptions file.

**Note** - If the UDF\_1 field has a negative value EZLink will flag the user's record as deleted. EZLink will append to the Username the text string 'DELETE-<date>'. This allows removal of parent/guardians who leave the school district or staff members that are no longer employed.

While EZLink will apply further updates to a user record that is flagged as deleted until it is purged from the database, future updates will not reactivate the record. This can only be accomplished manually by an administrator using the Utilities > Deleted Users function of EZCommunicator.

*(Note: For identifying the school, the Building\_ID (UDF1) will be used. If this Building\_ID does not match any school or location in the database, EZLink will generate an exception.)*

**\*UDF 2 - ContactID;** The unique ContactID for the User from User Data Source. This field is used for reference and record matching. If a record with this Contact ID exists in the database, the fields from the import record will be used to update the user record. Otherwise, a new user record will be created. If this field is blank EZLink will output the data record to the exceptions file.

**UDF 3 - Last Change Date/Time;** The date/time for when the parent/guardian record was changed. This field is used to determine whether to update records in the database. If this field is blank EZLink will use the date/time that it processes the export file.

**\*RELATIONSHIP ID** – This is an integer value of the school relationship that will be assigned to this user's record. The relationship\_ID must match one of the relationships created in the OCC database or EZLink will output the data record to the exceptions file.

**Note** - If the relationship\_ID is a negative integer (e.g. -1) EZLink will remove the associated school and relationship from the user record. This allows changing of school relationships throughout the year.

**NOTES** – This is a text field of up to 100 characters that can contain information about the parent/guardian or the student to whom they are associated in the SIS. These notes will be appended to the user's Notes field in their OCC record.

*(Note: This field may contain the student name for the associated school & relationship ID. If more than one record appears in the EZLink source file for the same parent/guardian the name for the second and subsequent student will be appended.)*

## Configuration Settings

There is a separate configuration file which EZLink uses to determine how to apply certain data processing rules. There is one configuration file per customer account and it contains the following settings, which the customer

can determine how to configure -

**Username Setting** - The Username field can either be processed to use the value provided in the import record, or to construct a new Username, based on First\_Initial + Last\_Name + Last\_Four\_Home Phone fields in the import record.

**Notes Setting** - The Notes field can either be processed to append the existing values to the Notes field or replace the existing values in the Notes field. This rule is applied at the file level. All consecutive records within a single file with the same Contact ID will be processed with the append rule, so that a parent with multiple students will have all students on their Notes field.

**EZLink Administrator Email** - The results files from EZLink processing will be sent to the designated email address for the EZLink Administrator.

## Business Rules

The following rules will be applied to formatting and content of the export file from Student Information System that will be loaded in to the Online Contact Center system.

1. File format – The export file should be in CSV format. All fields must be separated by commas. For example,

\*Username, \*First Name, Middle Name, \*Last Name, Primary Email, Second Email, Address, City, \*State/Province, Zip/Postal\_Code, \*Home\_Phone, Work\_Phone, Mobile\_Phone, Smartphone\_PDA, School\_Name,\*UDF1 (BuildingID), \*UDF2 (ContactID), UDF3 (Import Date), \*RelationshipID, Notes

If there is an incorrect number of fields in a data record in the export file, or if any of the records are missing a value in one of the required fields, EZLink will place the data record in the exceptions file.

2. Multiple School Relationships – Users with more than one school relationship may have multiple records with all data the same in each record, except for the School Name and BuildingID (UDF1), and the RelationshipID and Notes. A second or subsequent record should only be added to the export file if the school is different, or if the RelationshipID is different.

For example, If John Smith was a parent/guardian of an elementary school and middle school student, the records in the export file would look similar to the following -

123456,John,,Smith,[jsmith@yahoo.com](mailto:jsmith@yahoo.com),,,,,,111-111-1111,,,Your School District Elementary,24,123456,12-Jan-09; 09:04:04,4,Forth\_Grade Smith

123456,John,,Smith,[jsmith@yahoo.com](mailto:jsmith@yahoo.com),,,,,,111-111-1111,,,Your School District Middle,12,123456,12-Jan-09; 09:04:04,6,Sixth\_Grade Smith

Additionally, if John Smith was a parent/guardian of a freshman and junior in high school the export file would contain records similar to the following

123456,John,,Smith,[jsmith@yahoo.com](mailto:jsmith@yahoo.com),,,,,,111-111-1111,,,Your School District High,24,123456,12-Jan-09; 09:04:04,9,Freshman Smith

123456,John,,Smith,[jsmith@yahoo.com](mailto:jsmith@yahoo.com),,,,,,111-111-1111,,,Your School District High,24,123456,12-Jan-09; 09:04:04,11,Junior Smith

3. Multiple Guardians – If there is more than one Parent/Guardian for a student record, create separate records for each. The UDF2 (UserID) field must be unique for each parent/guardian so that EZLink can either match an existing record or create a new user record.

For example, if John and Mary Smith were the parent/guardians of a high school junior the import file would contain records similar to the following.

123456,John,Richard,Smith,[jsmith@yahoo.com](mailto:jsmith@yahoo.com),,,,,,111-111-1111,,,Your School District High,24,123456,12-Jan-09; 09:04:04,11,Junior Smith

123457,Mary,Jane,Smith,[msmith@gmail.com](mailto:msmith@gmail.com),,,,,,111-111-1111,,,Your School District High,24,123457,11-Jan-09; 09:04:04,11,Junior Smith

... and EZLink would process them and create/update two separate user records in the Relatrix database.

However, if the following records were included in the import file

123456,John,Richard,Smith,[smith-family@yahoo.com](mailto:smith-family@yahoo.com),,,,,,111-111-1111,,,Your School District High,24,123457,12-Jan-09; 09:04:04,11,Junior Smith

123456,Mary,Jane,Smith,[smith-family@yahoo.com](mailto:smith-family@yahoo.com),,,,,,111-111-1111,,,Your School District High,24,123457,11-Jan-09; 09:04:04,11,Junior Smith

EZLink will use the second record to update the first so that only Mary Jane Smith would have a user record in the Relatrix database.

4. No Primary Email Address – If a user record has no Primary email value the data record will still be processed. The user without a Primary email will be able to login to your Online Contact Center with the Username provided to or created by EZLink, but the system will not be able to send a password recovery email if no primary email address is included.

5. Username creation rules – There is now an EZLink Configuration File parameter to control whether EZLink creates a new Username or uses the one supplied in the first field of each record. If this parameter is set to create a new username, all new user records created by EZLink will have the following format:

Username = First Initial + Last\_Name + Last 4 Home\_Phone

For example, John Richard Smith (whose home phone is 111-111-1111) would have the following Username created:

***JSmith1111***

6. UDF3 (Date/Time Stamp) – The date/time value on the export record will be used to update the UDF3 date value on the Relatrix user record, if the user record exists. If the user record does not exist and a new record is created the date/time value in the import record will be inserted in the UDF3 value on the new record. The (CREATE\_DATE) for the inserted user record will be set to the date/time EZLink processes the record, and the source for the new record will be 'Loaded From EZLink'.

7. Record Ordering – All records for an individual Parent/Guardian should appear in the transfer file in sequence, based on the different schools where they have children. If multiple students attend the same school, insert different records if different school relationships (e.g. – 9th Grade Parent, 11th Grade Parent) are being applied. If only one relationship (e.g. Parent/Guardian) is being applied do not include a second record.

8. New User Password – A new user (one that is not matched to an existing record) will be created automatically by EZLink when processing the export file. The convention for the password will be First\_Initial + Last\_Name + Last4\_HomePhone. Users loaded by EZLink will be required to change their password when they initially sign-in to their MyAccount area.

9. Original Import Files & Exception Files - EZLink will save the original import file and create three results processing files to help in troubleshooting any data processing issues with the import files. The files will also be saved on the FTP server, in the /Archives folder. The -exception and -log files will also be sent by email to the designated EZLink administrator.

**-exception** - This file contains any original records from the export file that EZLink was unable to successfully process. If the data issues are corrected in this file it can be uploaded and reprocessed.

**-log** - This file contains the processing notes for each of the records in the



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-exception file.

## Process Scheduling

The EZLink process will be scheduling to run on a nightly or weekly schedule to coincide with the customer's upload schedule. This schedule will be agreed between the customer and Relatrix customer support team.