

# ***EKU***<sup>®</sup>

## **SLATE & AXIOM RECORD RESOLUTION GUIDE**



# Record Resolution

Record Resolution should occur daily in Slate, Axiom and Banner, before applications are worked. Consolidate Records in Slate should occur prior to Axiom or Banner. Banner unit – GR/UG/OLŽCS should not have duplicate records as these are coming in with EKU ID

Axiom Verifier should follow Consolidate Records (Slate),

- § UG- Applications, Decisions, Address, Test, Schools, BDMS
- § GR- Application, Decisions, Address, Test, Schools, BDMS, Advisor

Hierarchy of Axiom script work-flow and dependencies:

- § Application is the initial script with a Decisions dependency. Decision records will remain “on hold” until app record pushes.
- § Decisions looks for Slate GUID on SARACMNT with respective appl no/term
- § Address, Schools, Tests are looking for a student record- Slate ID on GORADID

Banner Duplicate Cleanup should follow Axiom push,

- § IT to resolve SIS duplicate records
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# Slate Consolidation

See below for Technolutions documentation.

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## Consolidating and Merging Records

The documentation that pertains to your location in the Roadmap will display below.

Phase

Section

Roadmap Visual

Show Location in Roadmap

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## Overview

Slate provides a powerful system for identifying and consolidating duplicate records. With this power must come caution as well as an understanding of how Slate identifies duplicates and how Slate merges these records.

When two person records are identified in "Consolidate Records" as duplicates, Slate will determine the "higher quality" master record, a determination made using the following qualities, in decreasing order of significance:

1. application submitted
2. application started
3. directly updated from a form or event
4. imported from a search list

Data sections that support multiple, time-stamped values, such as interactions, test scores, materials, and application tabs will be merged and no data will be deleted. Data sections that support singular values will keep the value from the higher quality record.

Note that the matching criteria used in Upload Dataset and upon form submission only includes the rank #1 email address when evaluating potential matches. Email addresses on the device table that are not rank #1 *will not* be evaluated for matching, nor will they appear in Consolidate Records.

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## Person Records

The following duplicate searches are employed for person records:

- **First + Last + Email**

*Exact match on first name, last name, and rank #1 email address.*

- **Reversed Name + Email**

*Match on rank #1 email address and name where the first name exactly matches the last name of the other record and the last name exactly matches the first name.*

- **Address + Partial (First + Last)**

*Exact match on street address and postal code and partial match (first 3 letters) of first name and last name.*

- **First + Last + Birthdate**

*Exact match on first name, last name, and birthdate.*

- **Reversed Name + Birthdate**

*Exact match on birthdate and name where the first name exactly matches the last name of the other record and the last name exactly matches the first name.*

- **Nickname + Last + Birthdate**

*Exact match on last name and birthdate, where the first name of one record is a common nickname for the first name of the other record. For example, Abby is a common nickname for Abigail.*

- **Nickname + Last + Email**

*Exact match on last name and rank #1 email address, where the first name of one record is a common nickname for the first name of the other record.*

- **Email**

*Exact match on rank #1 email address.*

- **SSN**

*Exact match on SSN, excluding generic numbers like 000000000, 111111111, 999999999, and 123456789.*

- **First + Last + CEEB**

*Exact match on first name, last name, and CEEB code, excluding generic CEEBs like 0000, 9999, 000000, and 999999.*

- **Fields marked as containing unique IDs, such as Common App ID, SIS ID, etc.**

- **Slate ID**

*Exact match on Slate Override IDs.*

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## Dataset Records

The following duplicate searches are employed for dataset records. *Note: Dataset records are only considered a match if both records are associated with the same dataset.*

- **Name + Related Dataset**

*Exact match on name and related dataset record. For example, two Organization Contacts named John Doe associated with the same Organization.*

- **Username + Related Dataset**

*Exact match on username and related dataset record.*

- **Name + Address**

*Exact match on name, street address, and postal code.*

- **Fields marked as containing unique IDs, such as Common App ID, SIS ID, etc.**

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## School Records

The following duplicate searches are employed for school records. *Note: School records are only considered a match if both records are associated with the same person.*

- **Key**

*Exact match on key.*

- **Key + Level of Study**

*Exact match on key and level of study.*

- **Key + Degree**

*Exact match on key and degree.*

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# Axiom Resolution

See below for Axiom documentation

ACES LAW DEMO		APPLY TEXAS FRESHMAN		APPLY TEXAS FRESHMAN INTL		APPLY TEXAS GRADUATE	
Awaiting Verification	3	Awaiting Verification	0	Awaiting Verification	0	Awaiting Verification	0
With Flags	4	With Flags	0	With Flags	0	With Flags	0
On Hold	0	On Hold	0	On Hold	0	On Hold	0
With Errors	0	With Errors	0	With Errors	0	With Errors	0
Locked	0	Locked	0	Locked	0	Locked	0
Processing	1	Processing	0	Processing	0	Processing	0
Record		Record		Record		Record	

## Verification Dashboard

Example row of Source Tiles from the Verification Dashboard (above)

The Axiom Verification Dashboard is the first screen you see when you open Axiom. This screen allows you to select your data source, see the quantity of records in each queue, and access records to validate. Each tile on the Dashboard is a data source.

All sources available to you as a user appear here, in alphabetical order.

To access records for the data source, simply locate the tile of a specific data source (tiles are arranged alphabetically). The names of the queues that appear in blue contain records that need to be verified. The blue indicates that it is hyperlinked, and clicking it will automatically pull up the first record in that queue.

The queues in each source are defined as follows:

**Awaiting Verification** – The total number of records that need to be manually verified and corrected through the Verifier. This is where possible match records are addressed.

**With Flags** – The total number of records that have been flagged by a user. Flagged records typically have a comment attached to them, indicating a problem with a

record that may need a second opinion or some research. Records in a flagged status will not process until they are unflagged by the end user.

**On Hold** – These records are waiting on data to be present in the SIS. Once the data is there, the records will automatically load.

**Locked** – The total number of records being verified by other users. Because these records are open by other users, these records will be locked to you, in order to prevent duplicate work. This is not a queue that can be opened. Note: this queue replaces the “Records in All Queues” statistic from the previous Axiom versions.

**Note:** *The ‘Locked’ queue will never be hyperlinked, as it does not contain records that can be viewed in the verifier.*

**With Errors** – The total number of records that caused an error at any stage of processing in Axiom. Please contact your Axiom administrator and escalate to Axiom support [axsupport@ssdel.com](mailto:axsupport@ssdel.com) as appropriate.

**Processing** – The total number of records that are currently moving through your Axiom workflow. The number is displayed as a ratio of the number of records that are queued to the number of records that are currently processing. This is not a queue that can be opened.



**Note: The 'Processing' queue will never be hyperlinked, as it does not contain records that can be viewed in the verifier.**

## Match Verification

## Match Status

Axiom has the ability to search your database for records that match the incoming data. Based on the returns from the searches done in your database, Axiom will return a match status at the top of the record (see red box below).

**Match Selected** – Axiom has run your match procedures and received a return. Based on either user input or the match procedure configuration, a match has been selected.

**No Match Selected** – Axiom has run your match procedures and based on either user input or the match procedure configuration, a match has *not* been selected.

**No Matches available** – Axiom has run your match procedures and did not receive any returns.

## Axiom Matching Records in

The screenshot shows the Axiom interface. At the top left is the Axiom logo. The main header area contains the name 'May Khoury' and a 'Verify' button. To the right of the name, the status 'Match Selected' is displayed in a red-bordered box. Further right, a text box contains the label 'Record Header (above), Match Status (red box)'. In the top right corner, there is a user profile icon, a settings icon, and the text 'ACES LAW DEMO'. Below the header, there is a list of categories: 'PERSONAL INFORMATION', 'CONTACT INFORMATION', 'APPLICATION INFORMATION', and 'PRIOR COLLEGES'. Each category has a corresponding icon and a left-pointing arrow.

## Record Verification

### The Record Verifier

Upon selecting a hyperlinked queue or making your criteria selections in the Advanced tab and clicking the **Verify Records** button, you will be brought to the record verification. If there are possible matches, you will be run through the Match Tab. Selecting a match or saving a record as a new student will then direct you to the record in the verifier. If there were no possible or exact matches, you will be brought directly to the record in the verifier (pictured below). If a match is chosen and no data element issues exist, the record can be submitted.

In the record header at the top of the page, you can see the Student Name associated with the master record. Below the name is the record status. In the center of the header is the match status, and on the right side are the record navigation buttons and the source name.

The screenshot displays the Axiom elite Record Verifier interface. At the top, the header includes the Axiom elite logo, the name 'Nicholas Reyna', a 'Verify' button, and a 'Match Selected' status. On the right side of the header, it indicates 'Sample Application Demo' and '2 Records In Queue'. Below the header is a navigation menu with the following items: STUDENT INFORMATION, CONTACT INFORMATION, EDUCATIONAL HISTORY, APPLICATION, MISC, and DEFAULT GROUP. Each item has a left-facing arrow icon. The main content area is currently empty. At the bottom of the interface, there is a toolbar with buttons for 'Delete', 'Notes', 'Errors', 'Flag', 'Exit', navigation arrows, and 'Submit Match'.

## Field Groups in the Record Verifier

Below the record header is the tree view of this particular record. The tree view groups relevant information together, as well as provides a quick visual as to which groups and data fields have data that needs to be corrected before uploading to the database.

*Red* groups mean that that group contains at least one data field that has non-compliant data. Each field group that needs verification will be red and expanded automatically when a record is opened. Fields that do not require correction will be blue, and stay condensed unless you manually select the left facing arrow in the group header to expand it.

**AXIOM** elite SAMPLE APPLICATION DEMO

**Nicholas Reyna** Match Selected Sample Application Demo  
2 Records In Queue

Verify

STUDENT INFORMATION		CONTACT INFORMATION		CURRENT VALUE	MATCHING RECORD VALUE
Permanent Address		17502 Pazaree Court			<input checked="" type="checkbox"/>
Permanent City		Newport			<input checked="" type="checkbox"/>
Permanent State	<span style="color: red;">▲</span>	TXs	<span style="color: red;">Q</span>		<input checked="" type="checkbox"/>
Permanent Zip		77532			<input checked="" type="checkbox"/>
Area Code		281		281	<input type="checkbox"/>
Phone Number		4621662		4621662	<input type="checkbox"/>
Email					<input type="checkbox"/>

EDUCATIONAL HISTORY ←

APPLICATION ←

MISC ←

DEFAULT GROUP ←

Delete Notes Errors Flag Exit ← → Submit Match

During the verification phase of the system's import process, Axiom runs the matching search and returns the results to the user. The Match Dialogue is the location you would go to see what matches the system has found based upon the match configuration. It is here where you either manually match a record in the existing database to the incoming record, or mark a record as unique and save it as a new record.

clicking on the Match Status at the top of the record. Records that do not have any possible matches will simply open to the record verifier.

The Match Tab (pictured below) will open automatically any time you open a record that is not listed as **Match Selected**. You can return to the Match Dialogue at any time in a record with possible matches by simply

**Nicholas Reyna** Match Selected Matches Available Sample Application Demo

Verify

**MATCHING RECORDS**

Rank	ID	SSN	First Name	Last Name	Middle Name	Birth Date	Gender
		452837906	Nicholas	Reyna	Anthony	02191980	M
3.60	A00011746	123456789	Nicholas	Reyna	A.	05271982	M

Record Field	Record Value	Destination Value
Prior College From Date	03011996	03011996
Student First Name	Nicholas	Nicholas
Prior College To Date	03011999	03011999
HS Grad Date	05011998	05011998
Phone Number	4621662	4621662
HS CEEB Code	447420	447420
Program Code	PHARMD	PHARMD
Prior College From Date	03011996	03011999
Prior College To Date	03011999	03011996
Student Last Name	Reyna	Reyna

Advanced Destination Info Save Match New Record

Delete Notes Errors Flag Exit ← → Submit Match

Upon opening, the match tab will not have a match selected. The top row of the summary table is the Axiom row-- these are the values in the record that you are looking at. The subsequent rows below it are all of the possible matches for the record that already exist in the SIS. Each one is

## Correcting Data in the Verifier

pictured with matching fields indicated in green and nonmatching fields indicated in red. In the summary table, it is important to know that only the match criteria returned from the match procedure will appear in this top record comparison (such as First Name, Gender, Birth Date, Last Name, Email, SSN, etc). The other pieces of information will be useful in determining if the record is a match.

The color legend is as follows for the match window:

**Bold Text in Green Fields** are fields that match exactly. **Regular Text in Green Fields** are fields that are near matches. This is useful for you to determine non-identical fields that mean the same thing, such as "street" versus "ST".

**Red Fields** are fields that are not matches.

**White Fields** are fields that were null in axiom and/or the SIS.

The fields displayed in the summary table for every returned match can be customized.

Once you have used the information in the match tab to determine a match, select the match from the summary table (highlight the applicable match record) and click **SAVE MATCH**. If the record is not a match for any of the possible matches, click **NEW STUDENT**. If for any reason you decide that you cannot make a decision about whether the record is a duplicate at this point, simply click **EXIT** to be directed to the verifier. The record cannot be submitted until a match selection is chosen.

Within each group, form fields are color coded. *Red* fields indicate non-compliant data that needs to be corrected (remember that red fields will ONLY be found within red field groups). The reason the data is non-compliant can be found by simply hovering over the red fields. A message will appear with some information to help you fix the field (e.g. 'This Field is 1 Characters Too Long'). *White* fields indicate data that is compliant with the rules set for that field and is ready to be uploaded. The *Grey* fields on the right-hand side indicate the data in the SIS for a matching record.

## Correcting Text Values

To correct the data any field highlighted red, simply click in a field and overwrite the existing data.

**Step 1: Single left-click in the affected data field**

**Step 2: Modify content as necessary.**

**Step 3: When you hit Enter or click on another field, the corrected field will turn white, assuming the corrections meet database specifications.**

To correct data for a field connected to a lookup table, simply click the **Magnifying Glass** next to the field in question (pictured below). A popup box will appear (pictured bottom left) that lists the Code and Description for your SIS validation table associated with that field (pictured right). You can either select an appropriate value, or use the search field to enter any information you know about what the field should be. In some cases (including high school code lookup), related fields from the record will appear in the window to help you determine what to search for. As you type, this will search both columns, and return possible matches for your query.

Selecting **SAVE** will replace the old value with the new in the field. Selecting **CANCEL** will return you to the verifier, without changing the form field.

## Changing Field Values of Valid Data

There may be times when the incoming data meets database specifications but does not meet your university's specific data standards. Such examples include abbreviations, especially in address fields. Although the field is white, you still have the opportunity to correct the data within Axiom, just as you would a normal text field.

**Step 1: Single click in the field to place a cursor in a specific location.**

**Step 2: Modify the data field as necessary. As long as you do not break any database specifications for the field data, it will remain white.**

## Correcting Lookup Values

Term



201310



## TERM

Current Value: 201310

Filter Lookups:

Code	Description
200901	200901
200905	Fall 09
198810	Fall 1987
198910	Fall 1988
199010	Fall 1989
199110	Fall 1990
199210	Fall 1991
199310	Fall 1992
199410	Fall 1993
199510	Fall 1994
199610	Fall 1995
199710	Fall 1996
199810	Fall 1997
199910	Fall 1998

Close Save

**Step 1: Click the Magnifying Glass button next to the affected data field (Pictured above).**

**Step 2: The validation table values for that field appear in a popup box. Click the correct value or begin typing a filter for that field and click save (Pictured left)**

**Step 3: The corrected field will turn white.**

**Alternatively, if you know the correct value, instead of clicking the Magnifying Glass, you can correct the lookup value as you would correct a regular field value (See previous section).**

## Updating SIS Values

### Activating Inactive Fields

If you wish to activate a field that is not marked to upload to the database, you may do so by clicking the **Upload To Database** box for that particular field. If this field is linked to a group of fields, those fields will also check themselves to update to the database as well.

Keep in mind that if you activate an inactive field that requires data input due to database specifications, that field will turn red and will need to be corrected before the record will upload.

MA Area Code	610	<input type="checkbox"/>
MA Phone Number	5555555	<input type="checkbox"/>



MA Area Code	610	<input checked="" type="checkbox"/>
MA Phone Number	5555555	<input checked="" type="checkbox"/>

This is a group of fields that was not marked to upload to the database. By clicking on the Phone area code 1 field, related fields are also marked to upload (in this case, Phone Number 1). If the entity configuration allows, you can also deselect fields from preventing them from uploading to the database.

## Updating Matching Record Information

If you have selected a match, you may notice that Axiom has already selected fields to update and has deselected others. If an incoming field exactly matches what exists in the database, that field will **not** be checked to update the database. So for example, the word “Street” does not exactly match the abbreviation “St”. This is viewed as being different data and will mark that field to update the database. Please note that this exact match routine is not case sensitive.

## Processing Buttons

The options along the bottom of the verifier (pictured below) are particularly useful for records that have been flagged, have an error or have an image associated with them.

The Processing Buttons are defined as follows:

**EXIT** will return you to the verification dashboard without updating the record in the database.

**ERRORS** will show you detailed information on errors that occurred in Transformation, Verification or Upload. This button will only appear if there are errors associated with the record.

**FLAG** will allow you to flag a record. This is useful if you need to get a second opinion or further information before submitting the record, but would like to move on to a different record. This will move the record, along with any notes you have regarding why you flagged the record, into the Flagged queue. All flagged records are easily re-accessed from the Dashboard. It is important to note that once a record has been flagged, this button will change to read **UNFLAG**. You will have to unflag the record in order to load it into the SIS.

**NOTES** allows you to add a note to the record without moving it to the Flagged queue. This is also where you can view notes that were added when a record was flagged.

**DELETE** allows you to delete a record.

**SUBMIT** should be pressed once you have fully corrected all erroneous fields and dealt with any possible matches. This will submit the record for updating in the database.



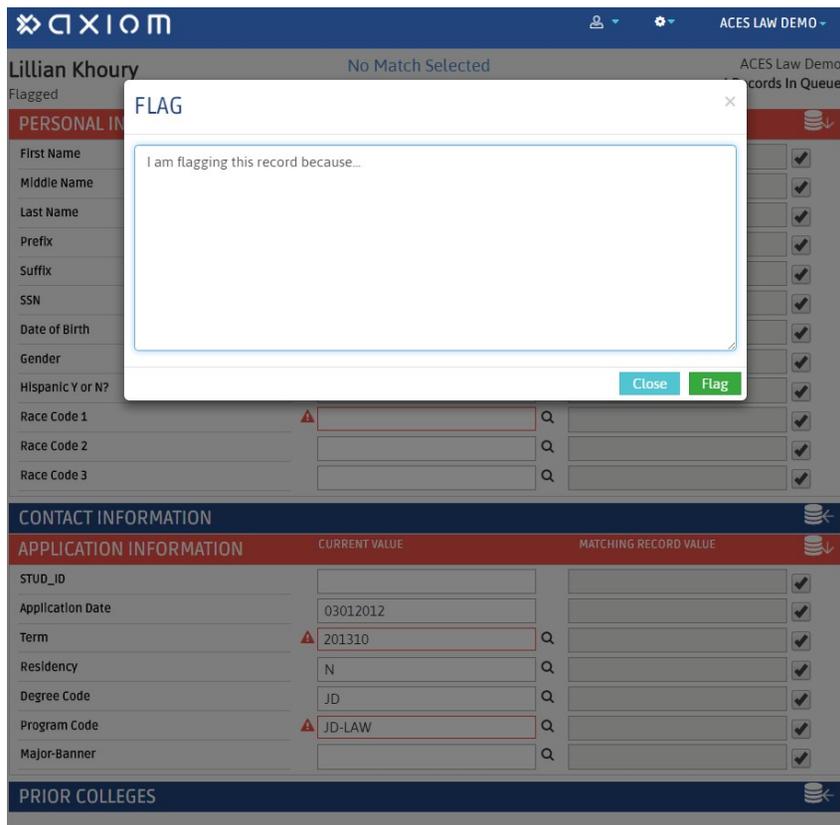
## Flagging Records

There may come a time where you need a second opinion on an application but do not have the time to find someone to ask, or when you may need to route a record to your supervisor. Sometimes, you may just need to set a record aside, put an electronic sticky note on it, and save it for later. You can accomplish all of this by simply flagging the record.

At the bottom of the record, you will find the processing button labeled **FLAG**.

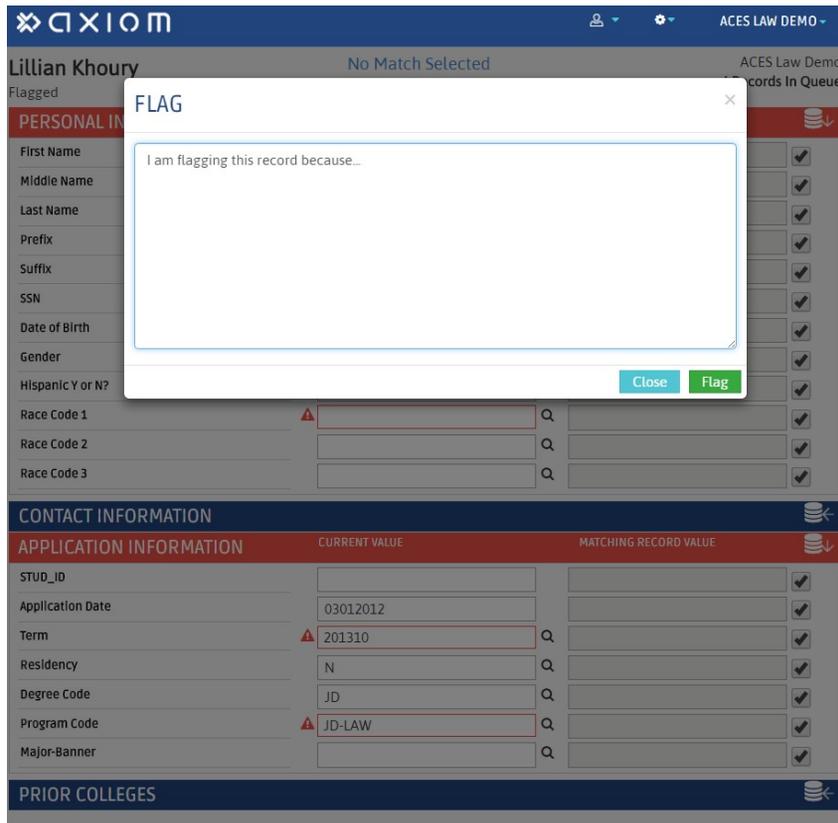


If the record has already been flagged, you can view the notes associated with the reason for flagging by clicking on the **NOTES** button.



Clicking on the FLAG button will bring up a dialogue that will allow you to add a detailed comment about why you flagged the record, for reference during later reviewing of flagged records (pictured left). Submit the flag by selecting the FLAG button in the dialogue box. If you change your mind and decide not to flag the record, simply click CANCEL. When you flag a record, you will automatically be moved to the next record. If there are no more records in the verifier, you will be moved back to the dashboard.

If you are reviewing flagged records, and you fix the errors and are ready to unflag and submit the record, simply click the button on the bottom of the screen that now reads **UNFLAG**.



Clicking on the FLAG button will bring up a dialogue that will allow you to add a detailed comment about why you flagged the record, for reference during later reviewing of flagged records (pictured left). Submit the flag by selecting the FLAG button in the dialogue box. If you change your mind and decide not to flag the record, simply click CANCEL. When you flag a record, you will automatically be moved to the next record. If there are no more records in the verifier, you will be moved back to the dashboard.

If you are reviewing flagged records, and you fix the errors and are ready to unflag and submit the record, simply click the button on the bottom of the screen that now reads **UNFLAG**.

## Viewing Errors

As we can see from our picture below, this was a record that failed upload due to several errors. The Transformation Errors and Verification Errors give specific error messages as to why a field failed. If this was an upload failed record, there would be the error message shown in the Upload Errors section that details what needs to be corrected for this record to push to the database. Errors in the Transformation Errors window should be reported to a supervisor.

Delete Notes Errors Flag Exit ← → Submit New Record


ACES LAW DEMO

**Lillian Khoury**  
 Verify

**PERSONAL INFORMATION**

First Name  
 Middle Name  
 Last Name  
 Prefix  
 Suffix  
 SSN  
 Date of Birth  
 Gender  
 Hispanic Y or N?  
 Race Code 1  
 Race Code 2  
 Race Code 3

**CONTACT INFORMATION**

**APPLICATION INFORMATION**

STUD\_ID  
 Application Date  
 Term  
 Residency  
 Degree Code

JD

**Record Submission Failed**

- Required Lookup List stvterm [56] expects column [stvterm\_code] but this is not present in the results
- Required Lookup List stvcitz [57] expects column [stvcitz\_code] but this is not present in the results
- Required Lookup List stvresd [58] expects column [stvresd\_code] but this is not present in the results
- Required Lookup List stvstat [59] expects column [stvstat\_code] but this is not present in the results
- Required Lookup List stvnatn [60] expects column [stvnatn\_code] but this is not present in the results
- Required Lookup List stvmajr [61] expects column [stvmajr\_code] but this is not present in the results
- Required Lookup List stvdegc [63] expects column [stvdegc\_code] but this is not present in the results
- Required Lookup List stvdegc [63] expects column [stvdegc\_code] but this is not present in the results
- Required Lookup List stvstat [59] expects column [stvstat\_code] but this is not present in the results
- Required Lookup List stvnatn [60] expects column [stvnatn\_code] but this is not present in the results
- Required Lookup List stvdegc [63] expects column [stvdegc\_code] but this is not present in the results
- Required Lookup List smrprle [66] expects column [smrprle\_program] but this is not present in the results
- Race Code 1 has unmet field requirements: Field is required
- Term has unmet field requirements: Value not found in Lookup List [56] stvterm
- Program Code has unmet field requirements: Value not found in Lookup List [66] smrprle

Close

ACES Law Demo  
 4 Records In Queue

RECORD VALUE

RECORD VALUE

Viewing

Flagged  
or  
Failed



ACES LAW DEMO 	
Awaiting Verification	3
<b>With Flags</b>	<b>4</b>
On Hold	0
<b>With Errors</b>	<b>0</b>
Locked	0
Processing	1

[Record](#) 

To select records that have been flagged or have failed the upload process, select the appropriate box or select the appropriate queue from the Axiom Verification Dashboard. As a reminder, the blue lines are hyperlinked and can be used to click directly into the queue with records of that type.

Once you have selected what you are looking for, those records will appear just like all other records, although their status will either be Flagged or Failed. In a failed record, if you click on the **ERRORS** button on the bottom of the page, you will be able to see the various reasons why a record failed upload. At the top of every record, you will see the Record Status.

What happens to a record once it makes it to one of these queues is up to you—either correct the data and submit it to the SIS, or correct the data and unflag the record. This sends the record back to the regular processing queue. Once you flag a record, the **FLAG** button becomes an **UNFLAG** button. Of course, if need be, you can also delete the record.



  ACES LAW DEMO ▾

**Wenjuan Pang**  
Flagged

 No Match Selected No Matches Available
 
 ACES Law Demo  
 4 Records In Queue

PERSONAL INFORMATION

 <

CONTACT INFORMATION

 <



# Viewing Records in Record Manager

AXIOM
SOURCES

SEARCH RECORDS

Search Criteria: 
Source: 
Data Origin:

**DAYTON CONTACT 09292016 RECORDS** [CONFIGURE SOURCE](#)

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Field Requirements	Transformation	Matching	Verification	Upload
34555	Nicholas	Malatesta	System Error	9/29/2016	12605	1_crmexport_contact_2.csv	Success 9/29/2016	Verify 9/29/2016	System Error 9/29/2016			
34556	Nicholas	Testoni	System Error	9/29/2016	12605	1_crmexport_contact_2.csv	Success 9/29/2016	Verify 9/29/2016	System Error 9/29/2016			

**CONFIGURATION TRAINING RECORDS** [CONFIGURE SOURCE](#)

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Transformation	Field Requirements	Matching	Verification	Post Verif
253	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	Verify 12/2/2016	
281	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	
282	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	
283	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	



Record ID	EMAIL ADDRESS	Status	Import Date	Import ID	Data Origin	Field Requirements	M	V	U		
37236	6jrowe@episcopahighschool.org	Deleted	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Deleted	12/29/2016
37261	admiss@wm.edu	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37237	admiss2@wm.edu	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37263	anb687@hotmail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37305	anb687@hotmail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37276	applicant@email.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37304	applicant@email.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37267	asmith@ssdel.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37253	bnorman@earthlink.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37262	bossyckick85@yahoo.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37298	bqctex@aol.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37270	briannie6@aol.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37232	bshof@comcast.net	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37272	bts025@gmail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37310	cbailard@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37284	cchristian@pcaemail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37309	ckd43@AOL.COM	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37273	corynnechapon@yahoo.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37234	csmith@ssdel.com	System Error	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	System Error	12/7/2016
37297	djones@ssdel.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37231	dschroot@dundermiflin.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37244	emailaddress@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37245	emailaddress@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37247	emailaddress@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016

Examples of returned search results are pictured above. The Record ID column indicates the Master Record ID number. To the right of the record ID will be listed the fields configured to display in the record manager. These fields are typically the first and last name, but can change based on what data is relevant and available. Your administrator can change the fields that included in this header. Following the information from the file, you'll find the following columns:

**Status:** the current status of the record.

**Import Date:** the date the file was imported

**Import ID:** the number associated with the imported file

**Data Origin:** the name of the file or database where the data came from

The sequence of phases follows the record information. The phase name appears at the top of the column with the date the record passed through the phase on the right and the status of the record at that point on the left. These are the possible results of each phase: **Success** - there were no issues.

**Reprocess** - the record was rolled back and is waiting to re-enter the order of phases.

**Deleted** - a user deleted a record.

**System Error** - something went wrong with the record at that phase.



You can click the [+] box left of the record ID to expand the record's data. Within an expanded record, you can quickly visualize how each field in the record was changed at each phase.

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Transformation	Field Requirements	Matching	Verification	Post Ve			
253	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success	12/11/2015	Success	12/11/2015	Verify	12/11/2015	Verify	12/2/2016	
			<b>Initial Value</b>			<b>Static Transformation</b>	<b>Transformation</b>		<b>Field Requirements</b>	<b>Matching</b>	<b>Verification</b>	<b>Post Verification</b>	<b>Transform Test</b>	<b>Upload</b>	<b>new phase</b>
AcademicProbationInsitution			N			N	N		N	N	N				
AcademicProbationProgram			N			N	N		N	N	N				
AddressCitizenship															
AddressMailCity			Silver Spring			Silver Spring	Silver Spring		Silver Spring	Silver Spring	Silver Spring				
AddressMailCountry			US			US	US		US	US	US				
AddressMailCountry			215			215	215		215	215	215				
AddressMailState			MD			MD	MD		MD	MD	MD				
AddressMailStreet1			3507 Edwin Street			3507 Edwin Street	3507 Edwin Street		3507 Edwin Street	3507 Edwin Street	3507 Edwin Street				
AddressMailStreet2															
AddressMailStreet3															
AddressMailZipCode			20902			20902	20902		20902	20902	20902				
AddressPermCity			Silver Spring			Silver Spring	Silver Spring		Silver Spring	Silver Spring	Silver Spring				
AddressPermCity (Sarquan)			Silver Spring			Silver Spring	Silver Spring		Silver Spring	Silver Spring	Silver Spring				
AddressPermCountry			US			US	US		US	US	US				
AddressPermCountry (Sarquan)			US			US	US		US	US	US				
AddressPermCountry			215			215	215		215	215	215				
AddressPermCountry (Sarquan)			215			215	215		215	215	215				
AddressPermLengthMonths															
AddressPermLengthYears			8			8	8		8	8	8				
AddressPermState			MD			MD	MD		MD	MD	MD				
AddressPermState (Sarquan)			MD			MD	MD		MD	MD	MD				
AddressPermStreet1			3507 Edwin Street			3507 Edwin Street	3507 Edwin Street		3507 Edwin Street	3507 Edwin Street	3507 Edwin Street				
AddressPermStreet1 (Sarquan)			3507 Edwin Street			3507 Edwin Street	3507 Edwin Street		3507 Edwin Street	3507 Edwin Street	3507 Edwin Street				

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin			
37234		csmith@ssdel.com	System Error	12/7/2016	12701	QAentityTEST.txt			
			<b>Initial Value</b>			<b>Field Requirements</b>	<b>M</b>	<b>V</b>	<b>U</b>
EMAIL ADDRESS			csmith@ssdel.com			csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com
EMAIL TYPE			PGSU			PGSU	PGSU	PGSU	PGSU
PIDM			214			214	214		



**From this view, you can determine the following information:**

Data changes as the data moved from phase to phase, which fields encountered errors, what errors the fields encountered, if the database was updated, field values and whether or not the field was sent to upload. When you expand a record, you will see each field value as it moved through each phase. The coloration below indicates how you can quickly see how field values were changed between steps:

1. Light grey background: The field was evaluated by a procedure and possibly changed.
2. Dark grey background with dark grey text: The field data was not changed at this phase.
3. For phases that enforce update location, if the data was sent to the database, a database icon will appear to the left of the information.

37234	csmith@ssdel.com	System Error	12/7/2016	12701	QAentityTEST.txt
Initial Value	Field Requirements	M	V	U	
EMAIL ADDRESS csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com
EMAIL TYPE PGSU	PGSU	PGSU	PGSU	PGSU	PGSU
PIDM 214	214	214			

4. Orange circle: an error was assigned to this field. Hover over the orange dot for more information.

New Field 1				
New Field 2				
Test 1 Score	300	300	300	

5. Red circle: an error was assigned to the record as a whole. Hover of the red dot for more information.

Success	12/7/2016	System Error	12/7/2016
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## Record Status

The status of a record can be easily determined in **Record Manager**. Record Status is denoted by the color of the cell in the “Record,” or record number column.

The colors are defined to the right. Should you happen to forget what a color means, simply hover over the cell to see a description of the record status.

For more information about why a record may have errored or failed upload, be sure to expand the record by using the [+] expand option on the left-most side of the record to view where the errors occurred.

Awaiting Verification	<ul style="list-style-type: none"><li>Record is in the verifier, ready to be verified by a user.</li></ul>
Processing	<ul style="list-style-type: none"><li>Record is either currently being imported or uploaded.</li></ul>
Awaiting Upload	<ul style="list-style-type: none"><li>End User has submitted the record, but services have not yet picked it up for upload.</li></ul>
Uploaded	<ul style="list-style-type: none"><li>Record has been successfully uploaded.</li></ul>
Hold	<ul style="list-style-type: none"><li>Record is in the hold queue.</li></ul>
Deleted	<ul style="list-style-type: none"><li>Record was marked for deletion.</li></ul>
Upload Failed	<ul style="list-style-type: none"><li>Record was verified and transformed successfully, but there was error that prevented it from uploading.</li></ul>
Processing Failed	<ul style="list-style-type: none"><li>Record has gotten stuck in processing.</li></ul>

## Record, File, and Source Actions

To take action on files and sources, or see more information, select a record from the record manager. You will then see the header change to display buttons for Record Info, Import Info, Source Info and Match Info. Click **Back** to return to the search bar.

The screenshot shows the Axiom elite interface. At the top, the logo 'AXIOM elite' is on the left, and 'SAMPLE APPLICATION DEMO' is on the right. Below the logo, the record details are displayed:

- Record: Nicholas Reyna
- File: C:\temp\SampleApplicationDemo\OCR Sample App Demo.TXT
- Source: Sample Application Demo

On the right side of the record details, there are four green buttons: 'Record Info', 'Import Info', 'Source Info', and 'Match Info'. Below these buttons is a 'Back' button.

Below the record details, there is a section titled 'SAMPLE APPLICATION DEMO RECORDS' with a 'CONFIGURE SOURCE' link. Below this section is a table with the following data:

Record ID	Student First Name	Student Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Transformation	Field Requirements	Matching	Verification
1	Nicholas	Reyna	Verify	10/21/2015	1	OCR Sample App Demo.TXT	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Verify 3/1/2017
2021	Nicholas	Reyna	Verify	11/3/2015	41	2015 11 03 - SampleApp.TXT	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Verify 2/2/2017

## Record, File, and Source Actions

To take action on files and sources, or see more information, select a record from the record manager. You will then see the header change to display buttons for Record Info, Import Info, Source Info and Match Info. Click **Back** to return to the search bar.

AXIOM elite SAMPLE APPLICATION DEMO

**Record:** Nicholas Reyna

**File:** C:\temp\SampleApplicationDemo\OCR Sample App Demo.TXT

**Source:** Sample Application Demo

[View In Verifier](#)

[Record Info](#)  
[Import Info](#)  
[Source Info](#)  
[Match Info](#)  
[Back](#)

**SAMPLE APPLICATION DEMO RECORDS** [CONFIGURE SOURCE](#)

Record ID	Student First Name	Student Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation		Transformation		Field Requirements		Matching		Verification	
1	Nicholas	Reyna	Verify	10/21/2015	1	OCR Sample App Demo.TXT	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Verify	3/1/2017
2021	Nicholas	Reyna	Verify	11/3/2015	41	2015.11.03 - SampleApp.TXT	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Verify	2/2/2017



## General Conventions in Axiom

### Multi-Field and Rapid Search

Search fields in Axiom are multi-field. The lookup field search within a record verification and the record search in record manager are both multi-field. This means that you can search with a variety of information (full or partial) that you are looking for. Simply typing a letter or part of a word will narrow your search results. In the lookup field search in the verifier, if you have narrowed down your search and there is only one result displayed, simply hit Enter, and the field will be replaced with the value you've looked up.

### Supported Browsers

Axiom can run on any browser, including Internet Explorer, Google Chrome, Mozilla Firefox, and Safari.



## Record Information

RECORD INFORMATION <span style="float: right;">×</span>			
<b>Nicholas Reyna</b>		<b>10/21/2015 03:28 PM</b>	
Static Transformation	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Transformation	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Field Requirements	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Matching	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Verification			
Upload			
File Export			
			<a href="#">Close</a>

You'll be presented with the record manager header information and the timestamp for when this record was created. Below, you'll see rows for each phase the record has processed through, including the status of the record at that phase, the timestamp the record entered that phase and the user responsible for moving the record.

You can click the **Roll Back** button to the right of each phase to reset the data to how it was **before** the record entered that phase. The record will then begin processing again at that point.



## Import Information

### IMPORT INFORMATION ×

**File Name:** OCR Sample App Demo.TXT  
**Import Date:** 10/21/2015 03:28 PM  
**File Source:** C:\temp\SampleApplicationDemo\OCR Sample App Demo.TXT  
**Backup Location:** C:\temp\SampleApplicationDemo\Backup\1\_OCR Sample App Demo.TXT

Re-Process File

Purge File

Close

You'll be presented with information about where the data came from. In the case of a file, you'll be presented with the name of the file that was imported, the timestamp when that file was brought into Axiom, the path the file was picked up from and the path where the file was moved to and renamed after it was processed.

# Reports

## Student Upload Report

The Student Upload report can be run by accessing the **Reports** menu, located under the cog in the upper-right hand corner.

The screenshot shows the CxIOM elite application interface. At the top, there is a navigation bar with the CxIOM elite logo on the left and a user profile icon, a settings cog icon (highlighted with a red box), and a 'SOURCES' dropdown menu on the right. Below the navigation bar is a grid of source reports. Each report card displays the source name, a settings cog icon, and a list of status categories with their respective counts. For example, the 'ACES LAW DEMO' report shows 3 'Awaiting Verification', 4 'With Flags', 0 'On Hold', 1 'With Errors', 0 'Locked', and 0 'Processing'. A dropdown menu is open on the right side of the interface, listing various system functions. The 'Reports' option in this menu is highlighted with a red box. Other options include 'Sources Dashboard', 'Create a New Source', 'Import Source', 'Export Source', 'View Inactive Sources', 'Configure Users', 'Configure User Groups', 'Connection Manager', 'Global Lookup Lists', 'Query Helper', 'Record Manager', 'Application Logs', 'System Configuration', 'Database Versioning', and 'Event Logs'.

Source Name	Status	Count
ACES LAW DEMO	Awaiting Verification	3
	With Flags	4
	On Hold	0
	With Errors	1
	Locked	0
	Processing	0
APPLY TEXAS FRESHMAN	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS FRESHMAN INTL	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS GRADUATE	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS GRADUATE INTL	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS READMIT	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS TRANSFER	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS TRANSFER IN	Awaiting Verification	0
	With Flags	0
	On Hold	0
	With Errors	0
	Locked	0
	Processing	0
APPLY TEXAS TRANSIENT		
DATABASE SOURCE		
DUPLICATE REMOVAL		
PTCAS DEMO		

The Student Upload report provides an overview of the records uploaded to the database in the specified data range. You will need to specify the source and date range you are interested in. You can also select a sort order, if desired. The report generated will give you information about which user uploaded to data, when it was uploaded, and if the record had a match and the index file information. This report can be exported to excel for easier viewing and flexibility.

## Student Import Report

The Student Import report can be run by accessing the **Reports** menu, located under the cog in the upper-right hand corner.

The screenshot displays the Axiom system interface. At the top, the Axiom logo is on the left, and a user profile icon and a cog icon (highlighted with a red box) are on the right. Below the header is a grid of source reports. A dropdown menu is open from the cog icon, listing various system functions. The 'Reports' option in this menu is highlighted with a red box.

Source Name	Awaiting Verification	With Flags	On Hold	With Errors	Locked	Processing
2 DAYTON APPLICATION 10032016	0	0	0	0	0	0
AA - DBAAS REWRITE TEST	0	0	0	0	0	0
ACT - TOM - REF TEST	3	0	0	0	0	0
AXIOM ELITE TRAINING M	0	0	0	0	0	0
CONFIGURATION TRAINING	47	0	0	0	1	0
DELETE ME	0	0	0	0	0	0
DATABASE AS A SOURCE TEST	0	0	0	0	0	0
DAVE'S TEST SOURCE	0	0	0	0	0	0
DAYTON APPLICATION 10032016	0	0	0	0	0	0
DAYTON CONTACT 09292016	0	0	0	0	0	0
DAYTON CONTACT 12122016	0	0	0	0	0	0
ENTITY BULK TOOLS DEM	0	0	0	0	0	0

The Student Import Report provides an overview of the records imported into Axiom in a specific date range. You will be asked to specify the source and date range you are interested in. In the report, you will be able to view the file information, the date the record was imported, student name, if the record had a match, and where in the process the record is at the time the report is run.

This report can be exported to excel for easier viewing and flexibility.

## General Conventions in Axiom

### Multi-Field and Rapid Search

Search fields in Axiom are multi-field. The lookup field search within a record verification and the record search in record manager are both multi-field. This means that you can search with a variety of information (full or partial) that you are looking for. Simply typing a letter or part of a word will narrow your search results. In the lookup field search in the verifier, if you have narrowed down your search and there is only one result displayed, simply hit Enter, and the field will be replaced with the value you've looked up.

### Supported Browsers

Axiom can run on any browser, including Internet Explorer, Google Chrome, Mozilla Firefox, and Safari.

# Viewing Errors

As we can see from our picture below, this was a record that failed upload due to several errors. The Transformation Errors and Verification Errors give specific error messages as to why a field failed. If this was an upload failed record, there would be the error message shown in the Upload Errors section that details what needs to be corrected for this record to push to the database. Errors in the Transformation Errors window should be reported to a supervisor.

The screenshot shows the AXIOM system interface with a modal dialog box titled "Record Submission Failed". The dialog lists the following errors:

- Required Lookup List stvterm [56] expects column [stvterm\_code] but this is not present in the results
- Required Lookup List stvcitz [57] expects column [stvcitz\_code] but this is not present in the results
- Required Lookup List stvresd [58] expects column [stvresd\_code] but this is not present in the results
- Required Lookup List stvstat [59] expects column [stvstat\_code] but this is not present in the results
- Required Lookup List stvnatn [60] expects column [stvnatn\_code] but this is not present in the results
- Required Lookup List stvmajr [61] expects column [stvmajr\_code] but this is not present in the results
- Required Lookup List stvdegc [63] expects column [stvdegc\_code] but this is not present in the results
- Required Lookup List stvdegc [63] expects column [stvdegc\_code] but this is not present in the results
- Required Lookup List stvstat [59] expects column [stvstat\_code] but this is not present in the results
- Required Lookup List stvnatn [60] expects column [stvnatn\_code] but this is not present in the results
- Required Lookup List stvdegc [63] expects column [stvdegc\_code] but this is not present in the results
- Required Lookup List smrprle [66] expects column [smrprle\_program] but this is not present in the results
- Race Code 1 has unmet field requirements: Field is required
- Term has unmet field requirements: Value not found in Lookup List [56] stvterm
- Program Code has unmet field requirements: Value not found in Lookup List [66] smrprle

The background interface shows the profile of Lillian Khoury with sections for Personal Information, Contact Information, and Application Information. The top navigation bar includes buttons for Delete, Notes, Errors (highlighted), Flag, Exit, and Submit New Record. The right side of the interface shows "ACES LAW DEMO" and "4 Records In Queue".



## Viewing

## Flagged or Failed Records

ACES LAW DEMO 	
Awaiting Verification	3
<a href="#">With Flags</a>	4
On Hold	0
<a href="#">With Errors</a>	0
Locked	0
Processing	1
<a href="#">Record</a> 	

To select records that have been flagged or have failed the upload process, select the appropriate box or select the appropriate queue from the Axiom Verification Dashboard. As a reminder, the blue lines are hyperlinked and can be used to click directly into the queue with records of that type.

Once you have selected what you are looking for, those records will appear just like all other records, although their status will either be Flagged or Failed. In a failed record, if you click on the **ERRORS** button on the bottom of the page, you will be able to see the various reasons why a record failed upload. At the top of every record, you will see the Record Status.

What happens to a record once it makes it to one of these queues is up to you—either correct the data and submit it to the SIS, or correct the data and unflag the record. This sends the record back to the regular processing queue. Once you flag a record, the **FLAG** button becomes an **UNFLAG** button. Of course, if need be, you can also delete the record.



Wenjuan Pang

No Match Selected No Matches Available

ACES Law Demo

4 Records In Queue

Flagged

PERSONAL INFORMATION



CONTACT INFORMATION



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## Submitting Records



Once you have successfully gone through all the steps of record verification, you will need to submit the record. You will only be able to submit the record if it meets all of the following conditions:

- **Error-Free**
- **No flag associated with the record**

Once the record meets all of those conditions, it can be submitted by simply clicking the **SUBMIT** button at the bottom of the record.

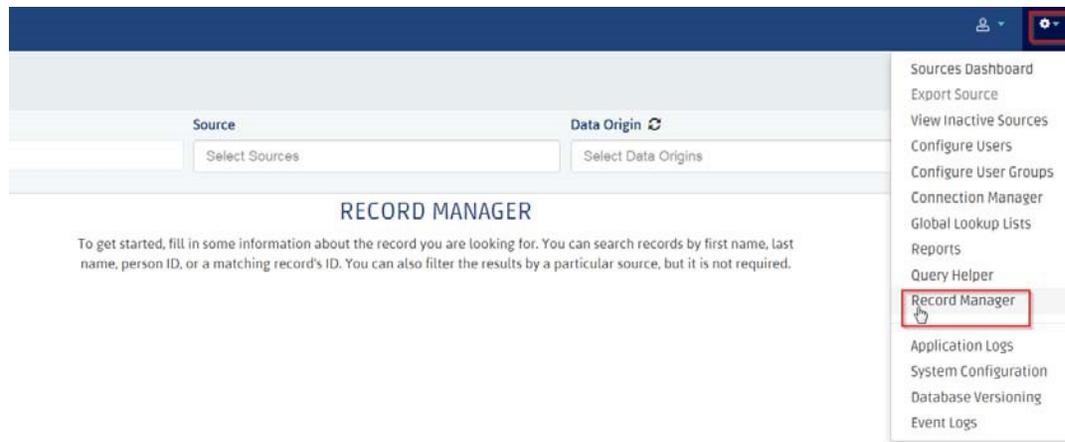
When the record is submitted for upload into the SIS, it will move to the processing queue, and no further action is required on your behalf.

After you've clicked **SUBMIT**, you will be advanced to the next record in the queue. If you have submitted the last record in the queue, you will be returned to the verification dashboard. From here, you can open a new group of records to verify.



# Record Manager

One of the new features of Axiom is the Record Manager. The Record Manager replaces the Data Manager from previous versions. This is how administrators can track data as it progresses through the Axiom system and determine where issues arise in the process. To access the Record Manager from the top of any page within Axiom, click on cog in the upper right-hand corner, and then click on **Record Manager**.



The search functionality is enabled for multi-field searching. You can enter any of the following types of information to locate a specific record within Record Manager. Your administrator can configure which fields will be included in this search.

You can narrow your results by limiting source and/or file level. If you aren't sure what source or file you are looking for, you can simply search all. If you are not searching for a specific record, but would like to see multiple records from a certain file or source, you can select the file/source combination you would like to see and simply search with  
no text typed into the search field.

The Record Manager search with no source or file defined will only return up to 100 results, while a search with source and a file defined will return up to 1000 results.

## Viewing Records in Record Manager

AXIOM
SOURCES

SEARCH RECORDS

Search Criteria: 
Source: 
Data Origin:

DAYTON CONTACT 09292016 RECORDS CONFIGURE SOURCE

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Field Requirements	Transformation	Matching	Verification	Upload
⊞ 34555	Nicholas	Malatesta	System Error	9/29/2016	12605	1_crmexport_contact_2.csv	Success 9/29/2016	⚠ Verify 9/29/2016	⚠ System Error 9/29/2016			
⊞ 34556	Nicholas	Testoni	System Error	9/29/2016	12605	1_crmexport_contact_2.csv	Success 9/29/2016	⚠ Verify 9/29/2016	⚠ System Error 9/29/2016			

CONFIGURATION TRAINING RECORDS CONFIGURE SOURCE

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Transformation	Field Requirements	Matching	Verification	Post Verif
⊞ 253	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	⚠ Verify 12/11/2015	Verify 12/11/2015	⚠ Verify 12/2/2016	
⊞ 281	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	⚠ Verify 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	
⊞ 282	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	⚠ Verify 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	
⊞ 283	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success 12/11/2015	Success 12/11/2015	⚠ Verify 12/11/2015	Verify 12/11/2015	Verify 12/11/2015	



Record ID	EMAIL ADDRESS	Status	Import Date	Import ID	Data Origin	Field Requirements	M	V	U		
37236	6jrowe@episcopahighschool.org	Deleted	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Deleted	12/29/2016
37261	admiss@wm.edu	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37237	admiss2@wm.edu	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37263	anb687@hotmail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37305	anb687@hotmail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37276	applicant@email.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37304	applicant@email.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37267	asmith@ssdel.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37253	bnorman@earthlink.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37262	bossyckick85@yahoo.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37298	bqctex@aol.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37270	briannie6@aol.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37232	bshof@comcast.net	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37272	bts025@gmail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37310	cbailard@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37284	cchristian@pcaemail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37309	ckd43@AOL.COM	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37273	corynnechapon@yahoo.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37234	csmith@ssdel.com	System Error	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	System Error	12/7/2016
37297	djones@ssdel.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37231	dschroot@dundermiflin.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37244	emailaddress@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37245	emailaddress@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016
37247	emailaddress@mail.com	Verify	12/7/2016	12701	QAentityTEST.txt	Success	12/7/2016	Success	12/7/2016	Verify	12/7/2016

Examples of returned search results are pictured above. The Record ID column indicates the Master Record ID number. To the right of the record ID will be listed the fields configured to display in the record manager. These fields are typically the first and last name, but can change based on what data is relevant and available. Your administrator can change the fields that included in this header. Following the information from the file, you'll find the following columns:

**Status:** the current status of the record.

**Import Date:** the date the file was imported

**Import ID:** the number associated with the imported file

**Data Origin:** the name of the file or database where the data came from

The sequence of phases follows the record information. The phase name appears at the top of the column with the date the record passed through the phase on the right and the status of the record at that point on the left. These are the possible results of each phase:

**Success** - there were no issues.

**Reprocess** - the record was rolled back and is waiting to re-enter the order of phases.

**Deleted** - a user deleted a record.

**System Error** - something went wrong with the record at that phase.



You can click the [+] box left of the record ID to expand the record's data. Within an expanded record, you can quickly visualize how each field in the record was changed at each phase.

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Transformation	Field Requirements	Matching	Verification	Post Ve				
253	Nicholas	Reyna	Verify	12/11/2015	65	MSU_UGrad_DataExport_50Fall2015App.txt	Success	12/11/2015	Success	12/11/2015	Verify	12/11/2015	Verify	12/2/2016		
			<b>Initial Value</b>	<b>Static Transformation</b>		<b>Transformation</b>		<b>Field Requirements</b>		<b>Matching</b>		<b>Verification</b>		<b>Post Verification Transform Test</b>	<b>Upload</b>	<b>new phase</b>
AcademicProbationInsitution			N	N		N		N		N		N				
AcademicProbationProgram			N	N		N		N		N		N				
AddressCitizenship																
AddressMailCity			Silver Spring	Silver Spring		Silver Spring		Silver Spring		Silver Spring		Silver Spring				
AddressMailCountry			US	US		US		US		US		US				
AddressMailCountry			215	215		215		215		215		215				
AddressMailState			MD	MD		MD		MD		MD		MD				
AddressMailStreet1			3507 Edwin Street	3507 Edwin Street		3507 Edwin Street		3507 Edwin Street		3507 Edwin Street		3507 Edwin Street				
AddressMailStreet2																
AddressMailStreet3																
AddressMailZipCode			20902	20902		20902		20902		20902		20902				
AddressPermCity			Silver Spring	Silver Spring		Silver Spring		Silver Spring		Silver Spring		Silver Spring				
AddressPermCity (Sarquan)			Silver Spring	Silver Spring		Silver Spring		Silver Spring		Silver Spring		Silver Spring				
AddressPermCountry			US	US		US		US		US		US				
AddressPermCountry (Sarquan)			US	US		US		US		US		US				
AddressPermCountry			215	215		215		215		215		215				
AddressPermCountry (Sarquan)			215	215		215		215		215		215				
AddressPermLengthMonths																
AddressPermLengthYears			8	8		8		8		8		8				
AddressPermState			MD	MD		MD		MD		MD		MD				
AddressPermState (Sarquan)			MD	MD		MD		MD		MD		MD				
AddressPermStreet1			3507 Edwin Street	3507 Edwin Street		3507 Edwin Street		3507 Edwin Street		3507 Edwin Street		3507 Edwin Street				
AddressPermStreet1 (Sarquan)			3507 Edwin Street	3507 Edwin Street		3507 Edwin Street		3507 Edwin Street		3507 Edwin Street		3507 Edwin Street				

Record ID	First Name	Last Name	Status	Import Date	Import ID	Data Origin	
37234		csmith@ssdel.com	System Error	12/7/2016	12701	QAentityTEST.txt	
		<b>Initial Value</b>	<b>Field Requirements</b>		<b>M</b>	<b>V</b>	<b>U</b>
EMAIL ADDRESS		csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com
EMAIL TYPE		PGSU	PGSU	PGSU	PGSU	PGSU	PGSU
PIDM		214	214	214			



**From this view, you can determine the following information:**

Data changes as the data moved from phase to phase, which fields encountered errors, what errors the fields encountered, if the database was updated, field values and whether or not the field was sent to upload. When you expand a record, you will see each field value as it moved through each phase. The coloration below indicates how you can quickly see how field values were changed between steps:

1. Light grey background: The field was evaluated by a procedure and possibly changed.
2. Dark grey background with dark grey text: The field data was not changed at this phase.
3. For phases that enforce update location, if the data was sent to the database, a database icon will appear to the left of the information.

Initial Value	Field Requirements	M	V	U
EMAIL ADDRESS csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com	csmith@ssdel.com
EMAIL TYPE PGSU	PGSU	PGSU	PGSU	PGSU
PIDM 214	214	214		

4. Orange circle: an error was assigned to this field. Hover over the orange dot for more information.

New Field 1			
New Field 2			
Test 1 Score	300	300	300

5. Red circle: an error was assigned to the record as a whole. Hover of the red dot for more information.

Success	12/7/2016	<b>System Error</b>	12/7/2016
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## Record Status

The status of a record can be easily determined in **Record Manager**. Record Status is denoted by the color of the cell in the “Record,” or record number column.

The colors are defined to the right. Should you happen to forget what a color means, simply hover over the cell to see a description of the record status.

For more information about why a record may have errored or failed upload, be sure to expand the record by using the [+] expand option on the left-most side of the record to view where the errors occurred.

Awaiting Verification	<ul style="list-style-type: none"><li>Record is in the verifier, ready to be verified by a user.</li></ul>
Processing	<ul style="list-style-type: none"><li>Record is either currently being imported or uploaded.</li></ul>
Awaiting Upload	<ul style="list-style-type: none"><li>End User has submitted the record, but services have not yet picked it up for upload.</li></ul>
Uploaded	<ul style="list-style-type: none"><li>Record has been successfully uploaded.</li></ul>
Hold	<ul style="list-style-type: none"><li>Record is in the hold queue.</li></ul>
Deleted	<ul style="list-style-type: none"><li>Record was marked for deletion.</li></ul>
Upload Failed	<ul style="list-style-type: none"><li>Record was verified and transformed successfully, but there was error that prevented it from uploading.</li></ul>
Processing Failed	<ul style="list-style-type: none"><li>Record has gotten stuck in processing.</li></ul>

## Record, File, and Source Actions

To take action on files and sources, or see more information, select a record from the record manager. You will then see the header change to display buttons for Record Info, Import Info, Source Info and Match Info. Click **Back** to return to the search bar.

The screenshot shows the Axiom elite interface. At the top, the logo 'AXIOM elite' is on the left, and 'SAMPLE APPLICATION DEMO' is on the right. Below the logo, the record details are displayed:

- Record:** Nicholas Reyna
- File:** C:\temp\SampleApplicationDemo\OCR Sample App Demo.TXT
- Source:** Sample Application Demo

On the right side of the record details, there are four green buttons: Record Info, Import Info, Source Info, and Match Info. Below these buttons is a blue 'Back' button. A link 'View In Verifier' is also present.

Below the record details is a section titled 'SAMPLE APPLICATION DEMO RECORDS' with a 'CONFIGURE SOURCE' link. Below this is a table with the following data:

Record ID	Student First Name	Student Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation	Transformation	Field Requirements	Matching	Verification
1	Nicholas	Reyna	Verify	10/21/2015	1	OCR Sample App Demo.TXT	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Verify 3/1/2017
2021	Nicholas	Reyna	Verify	11/3/2015	41	2015 11 03 - SampleApp.TXT	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Success 2/2/2017	Verify 2/2/2017

## Record, File, and Source Actions

To take action on files and sources, or see more information, select a record from the record manager. You will then see the header change to display buttons for Record Info, Import Info, Source Info and Match Info. Click **Back** to return to the search bar.


SAMPLE APPLICATION DEMO

**Record:** Nicholas Reyna

**File:** C:\temp\SampleApplicationDemo\OCR Sample App Demo.TXT

**Source:** Sample Application Demo

[View In Verifier](#)

[Record Info](#)  
[Import Info](#)  
[Source Info](#)  
[Match Info](#)  
[Back](#)

**SAMPLE APPLICATION DEMO RECORDS** [CONFIGURE SOURCE](#)

Record ID	Student First Name	Student Last Name	Status	Import Date	Import ID	Data Origin	Static Transformation		Transformation		Field Requirements		Matching		Verification	
1	Nicholas	Reyna	Verify	10/21/2015	1	OCR Sample App Demo.TXT	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Verify	3/1/2017
2021	Nicholas	Reyna	Verify	11/3/2015	41	2015.11.03 - SampleApp.TXT	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Success	2/2/2017	Verify	2/2/2017



## General Conventions in Axiom

### Multi-Field and Rapid Search

Search fields in Axiom are multi-field. The lookup field search within a record verification and the record search in record manager are both multi-field. This means that you can search with a variety of information (full or partial) that you are looking for. Simply typing a letter or part of a word will narrow your search results. In the lookup field search in the verifier, if you have narrowed down your search and there is only one result displayed, simply hit Enter, and the field will be replaced with the value you've looked up.

### Supported Browsers

Axiom can run on any browser, including Internet Explorer, Google Chrome, Mozilla Firefox, and Safari.



## Record Information

RECORD INFORMATION <span style="float: right;">×</span>			
<b>Nicholas Reyna</b>		<b>10/21/2015 03:28 PM</b>	
Static Transformation	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Transformation	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Field Requirements	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Matching	Success	02/02/2017 09:01 AM by System	<a href="#">↶ Roll Back</a>
Verification			
Upload			
File Export			
			<a href="#">Close</a>

You'll be presented with the record manager header information and the timestamp for when this record was created. Below, you'll see rows for each phase the record has processed through, including the status of the record at that phase, the timestamp the record entered that phase and the user responsible for moving the record.

You can click the **Roll Back** button to the right of each phase to reset the data to how it was **before** the record entered that phase. The record will then begin processing again at that point.



## Import Information

### IMPORT INFORMATION ×

**File Name:** OCR Sample App Demo.TXT  
**Import Date:** 10/21/2015 03:28 PM  
**File Source:** C:\temp\SampleApplicationDemo\OCR Sample App Demo.TXT  
**Backup Location:** C:\temp\SampleApplicationDemo\Backup\1\_OCR Sample App Demo.TXT

Re-Process File

Purge File

Close

You'll be presented with information about where the data came from. In the case of a file, you'll be presented with the name of the file that was imported, the timestamp when that file was brought into Axiom, the path the file was picked up from and the path where the file was moved to and renamed after it was processed.

# Reports

## Student Upload Report

The Student Upload report can be run by accessing the **Reports** menu, located under the cog in the upper-right hand corner.

The screenshot shows the CxIOM elite application interface. At the top, there is a navigation bar with the CxIOM elite logo on the left and a user profile icon, a settings cog icon (highlighted with a red box), and a 'SOURCES' dropdown menu on the right. Below the navigation bar is a grid of source reports. Each report card displays the source name, a settings cog icon, and a list of status categories with their respective counts. A 'Record' link with a magnifying glass icon is located at the bottom right of each report card. A dropdown menu is open on the right side of the interface, listing various system functions. The 'Reports' option in this menu is highlighted with a red box.

Source Name	Settings	Awaiting Verification	With Flags	On Hold	With Errors	Locked	Processing	Record
ACES LAW DEMO	⚙️	3	4	0	1	0	0	Record Q
APPLY TEXAS FRESHMAN	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS FRESHMAN INTL	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS GRADUATE	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS GRADUATE INTL	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS READMIT	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS TRANSFER	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS TRANSFER IN	⚙️	0	0	0	0	0	0	Record Q
APPLY TEXAS TRANSIENT	⚙️							
DATABASE SOURCE	⚙️							
DUPLICATE REMOVAL	⚙️							
PTCAS DEMO	⚙️							

- Sources Dashboard
- Create a New Source
- Import Source
- Export Source
- View Inactive Sources
- Configure Users
- Configure User Groups
- Connection Manager
- Global Lookup Lists
- Reports**
- Query Helper
- Record Manager
- Application Logs
- System Configuration
- Database Versioning
- Event Logs

The Student Upload report provides an overview of the records uploaded to the database in the specified data range. You will need to specify the source and date range you are interested in. You can also select a sort order, if desired. The report generated will give you information about which user uploaded to data, when it was uploaded, and if the record had a match and the index file information. This report can be exported to excel for easier viewing and flexibility.

## Student Import Report

The Student Import report can be run by accessing the **Reports** menu, located under the cog in the upper-right hand corner.

The screenshot displays the Axiom system interface. At the top, the Axiom logo is on the left, and a user profile icon and a cog icon (highlighted with a red box) are on the right. Below the header is a grid of source reports. Each report card shows the source name, a gear icon, and a table of status counts. A dropdown menu is open from the cog icon, listing various system functions. The 'Reports' option in this menu is highlighted with a red box.

Source Name	Awaiting Verification	With Flags	On Hold	With Errors	Locked	Processing
2 DAYTON APPLICATION 10032016	0	0	0	0	0	0
AA - DBAAS REWRITE TEST	0	0	0	0	0	0
ACT - TOM - REF TEST	3	0	0	0	0	0
AXIOM ELITE TRAINING M	0	0	0	0	0	0
CONFIGURATION TRAINING	47	0	0	0	1	0
DELETE ME	0	0	0	0	0	0
DATABASE AS A SOURCE TEST	0	0	0	0	0	0
DAVE'S TEST SOURCE	0	0	0	0	0	0
DAYTON APPLICATION 10032016	0	0	0	0	0	0
DAYTON CONTACT 09292016	0	0	0	0	0	0
DAYTON CONTACT 12122016	0	0	0	0	0	0
ENTITY BULK TOOLS DEM	0	0	0	0	0	0

The Student Import Report provides an overview of the records imported into Axiom in a specific date range. You will be asked to specify the source and date range you are interested in. In the report, you will be able to view the file information, the date the record was imported, student name, if the record had a match, and where in the process the record is at the time the report is run.

This report can be exported to excel for easier viewing and flexibility.

## General Conventions in Axiom

### Multi-Field and Rapid Search

Search fields in Axiom are multi-field. The lookup field search within a record verification and the record search in record manager are both multi-field. This means that you can search with a variety of information (full or partial) that you are looking for. Simply typing a letter or part of a word will narrow your search results. In the lookup field search in the verifier, if you have narrowed down your search and there is only one result displayed, simply hit Enter, and the field will be replaced with the value you've looked up.

### Supported Browsers

Axiom can run on any browser, including Internet Explorer, Google Chrome, Mozilla Firefox, and Safari.

# Slate Record Resolution Group

The members of the Slate Resolution Group:

- Matt Schumacher, CS
  - Tiffany Hampton, CS
  - Carrie Ernst, Graduate School
  - Stephanie Cunagin, Graduate School
  - Nathan Rice, Undergraduate
  - Laura Hollingsworth, Undergraduate
  - Tiffany Sokolowski, Undergraduate
  - Dan Hendrickson, Registrar
  - Brandi Stocker, e-Campus
  - Jeremy Steele, IT
  - Adam White, IT
-



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