



Integrating Slate with Guidebook

The Slate integration connects Guidebook to your Slate by Technolutions instance, automatically importing and syncing student records into Guidebook. Records are matched to student accounts using each student's NetID or email. Once active, students see their Slate-sourced details directly in the Guidebook mobile app.

What You'll Need

Account Matching Configuration

To link student records from Slate to the correct accounts in Guidebook, you'll need a way to match each student's Slate profile to their app account. Guidebook supports two options:

- **SAML SSO with NetID**
 - If your organization has SAML SSO configured with NetID returned as part of the authentication response, Guidebook can use NetID to match Slate profiles to app accounts. If SSO has not yet been configured and you'd like to use this method, contact your Guidebook account manager to get this in place. If you're unsure who your account manager is, reach out to sales@guidebook.com.
- **Email-based matching:** If you don't have SSO configured, Guidebook can match students using their email address instead. For this to work, the Guidebook user email must match the student's Slate profile email. **The user email must also be verified** in order to link correctly to their Slate profile.

Slate Integration Setup

Completing the Slate integration setup requires two steps: creating a Query Web Service in Slate, then connecting it to your organization in Guidebook Builder.

Guidebook provides pre-built Slate Suitcases that define which student fields are available to sync. Importing these Suitcases into your Slate environment is the standard

way to expose your Slate data to Guidebook, and ensures the correct fields are formatted and available for the integration to use.

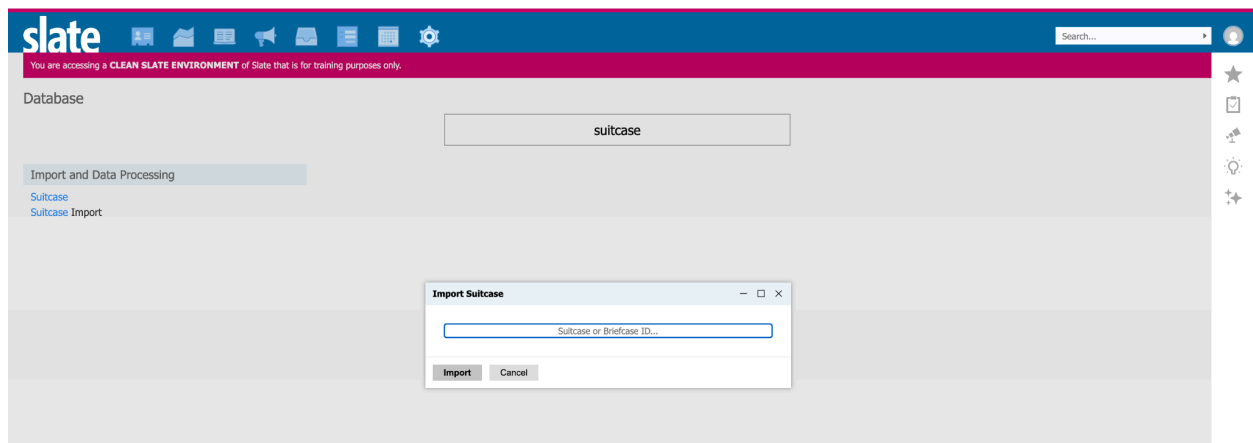
In addition to standard fields, Guidebook can support a limited number of custom fields. Custom field support is scoped on a case-by-case basis. Please work with your Guidebook account manager before adding any custom fields. For commonly requested custom fields, Guidebook provides a Custom Fields Suitcase that includes pre-configured support for fields such as Major, College, and NetID.

Slate Configuration (Building a Query Web Service in Slate)

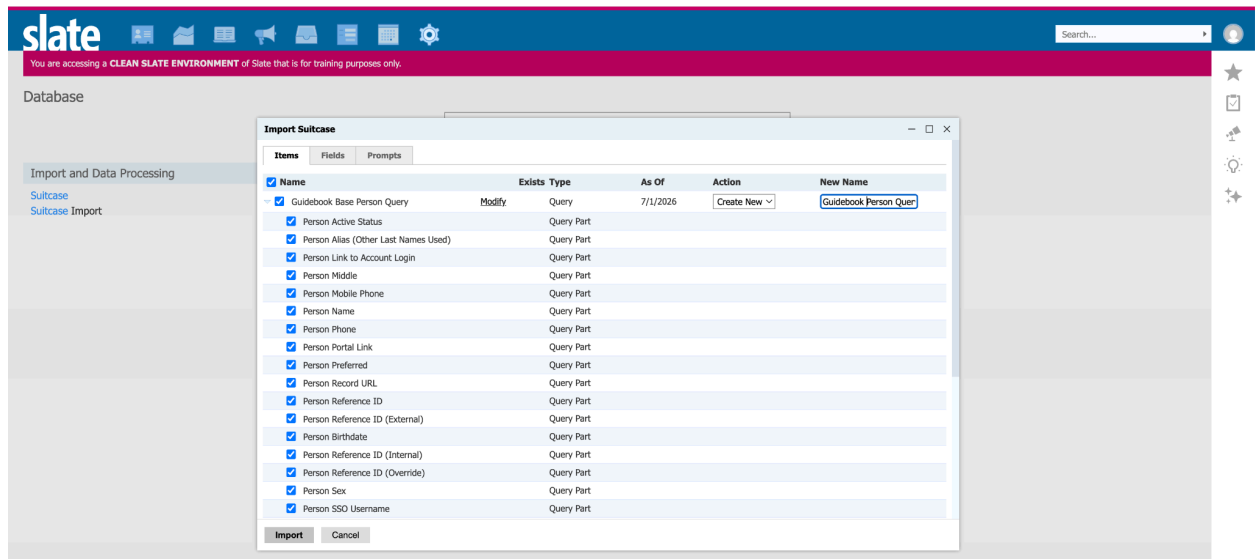
In Slate, you will need to import two Suitcases — one for the base Person Query and one for Custom Fields. These will be configured as a JSON web service for Guidebook to access.

1. Import the Guidebook Base Person Suitcase ID via Database > “Suitcase Import”

Enter Suitcase ID: df2da26c-76ad-4a7b-9296-3131eaedfc74:gdb

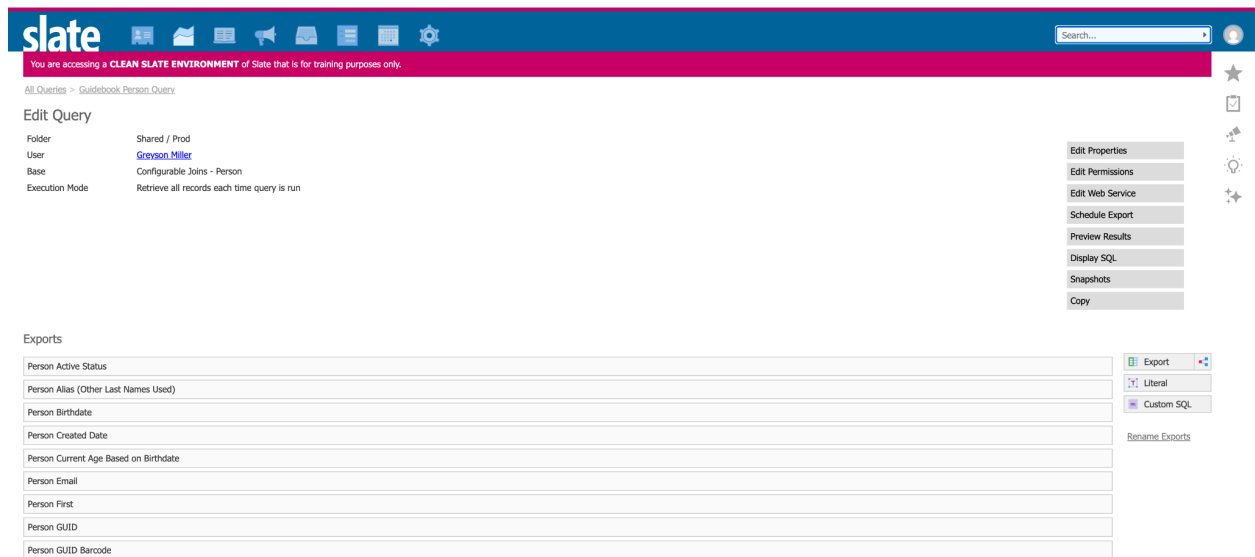


2. Select “Import” and set the New Name to “Guidebook Person Query”



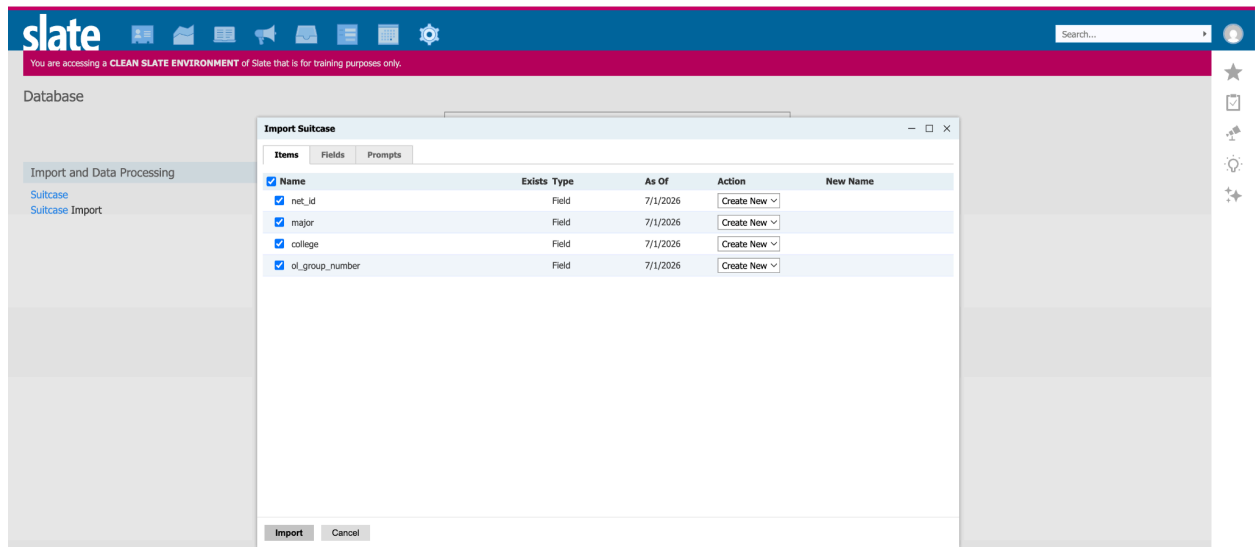
Note: You have the option at this time to de-select any fields you do not want to provide to Guidebook. For best results, we recommend importing the full set of fields.

3. Validate the import by selecting “Edit Query”. Confirm that fields are populated in the “Exports” section.

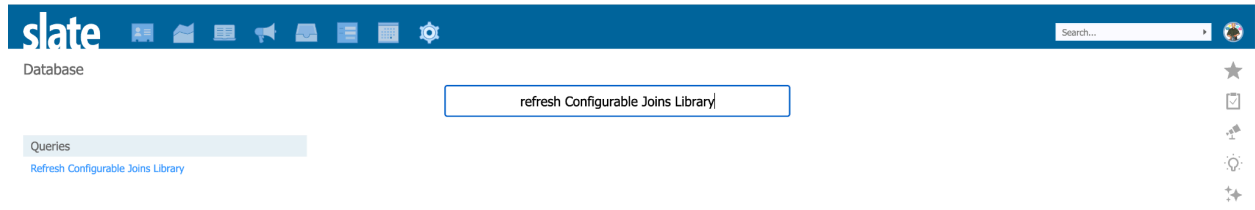


4. Import the Custom Fields Suitcase. The default Custom Fields Suitcase ID is: 53daf0d6-376a-4c18-b9ec-fe13f1d1333f.gdb

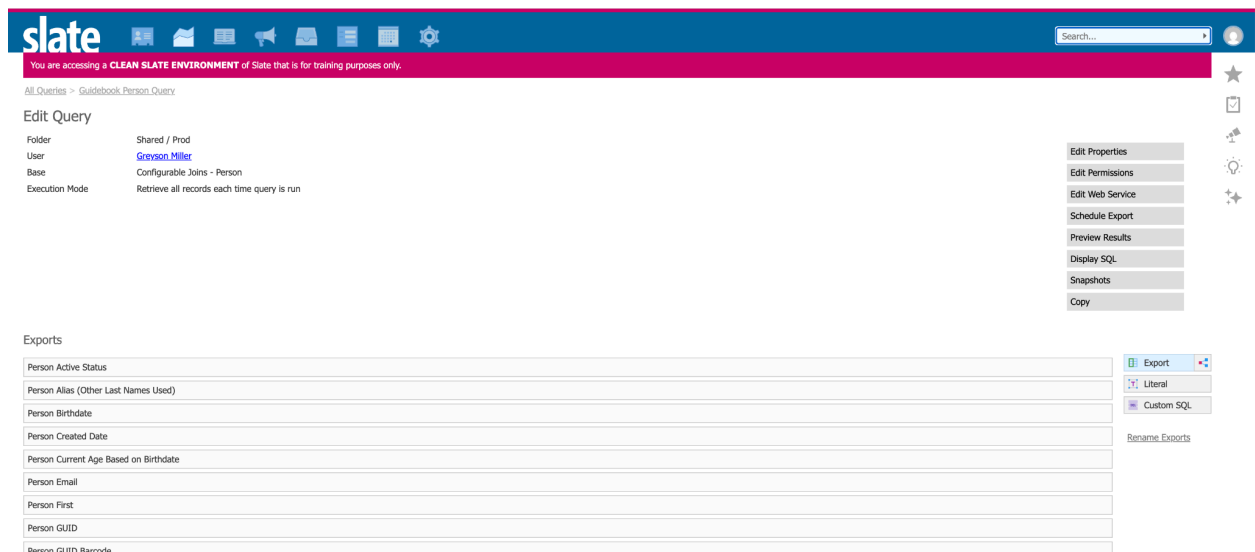
Follow the same import process from Steps 1–2, then verify the result appears as shown.



5. Refresh the Configurable Joins Library. From the Database page, click into the “Search Database...” text box and search for “Refresh Configurable Joins Library”, then press OK. This surfaces the new Custom Fields for export in the next step.

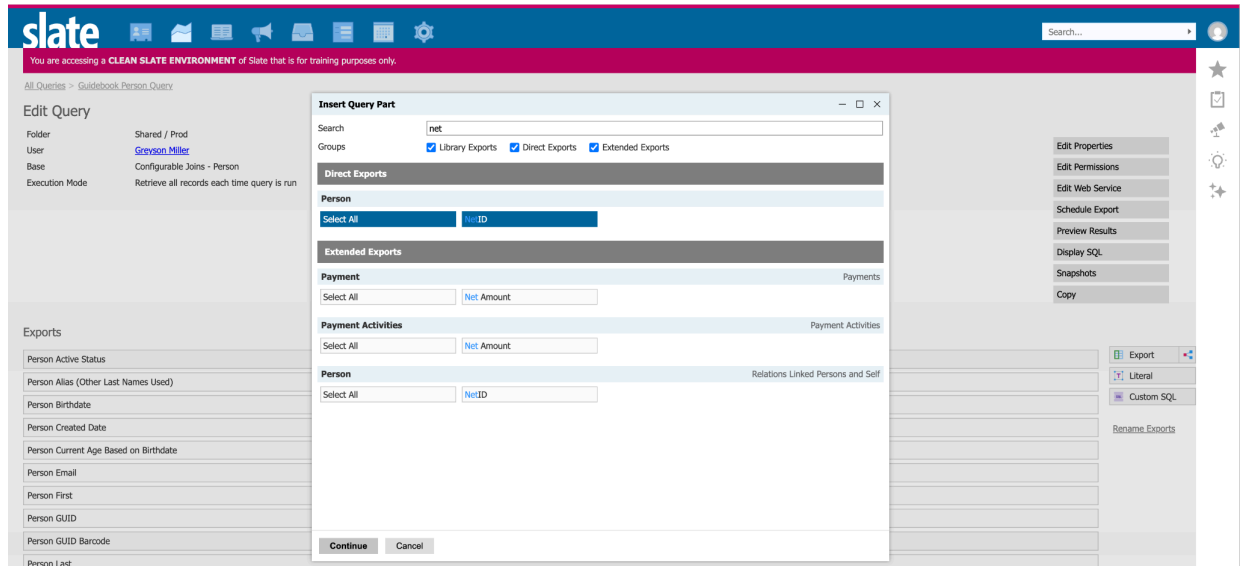


6. Go to Queries and select “Guidebook Person Query”, then “Edit Query”. Add the custom fields to the Export list using the “Export” button.

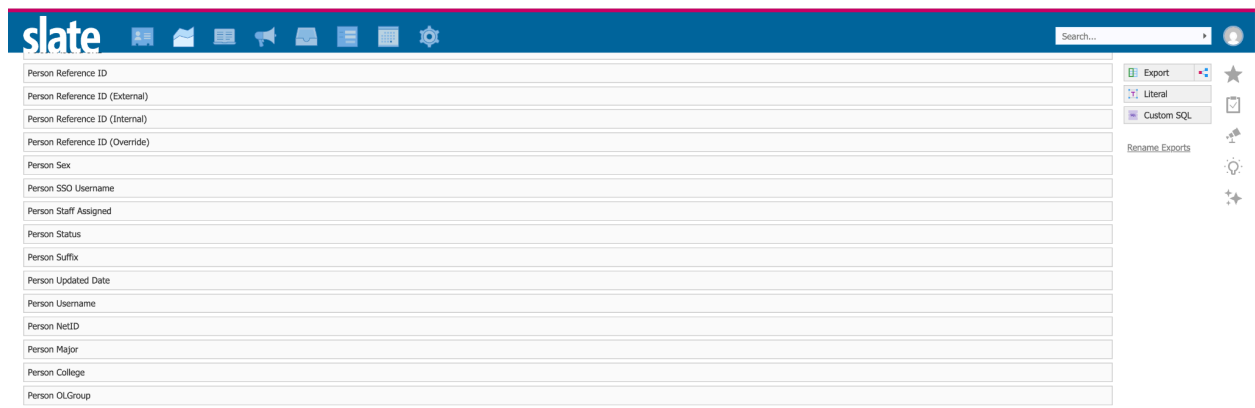


7. Select (or search for) each of your desired custom fields, and add them by selecting the field and clicking “Continue”.

In this example we are adding: NetID from the available custom Person fields.



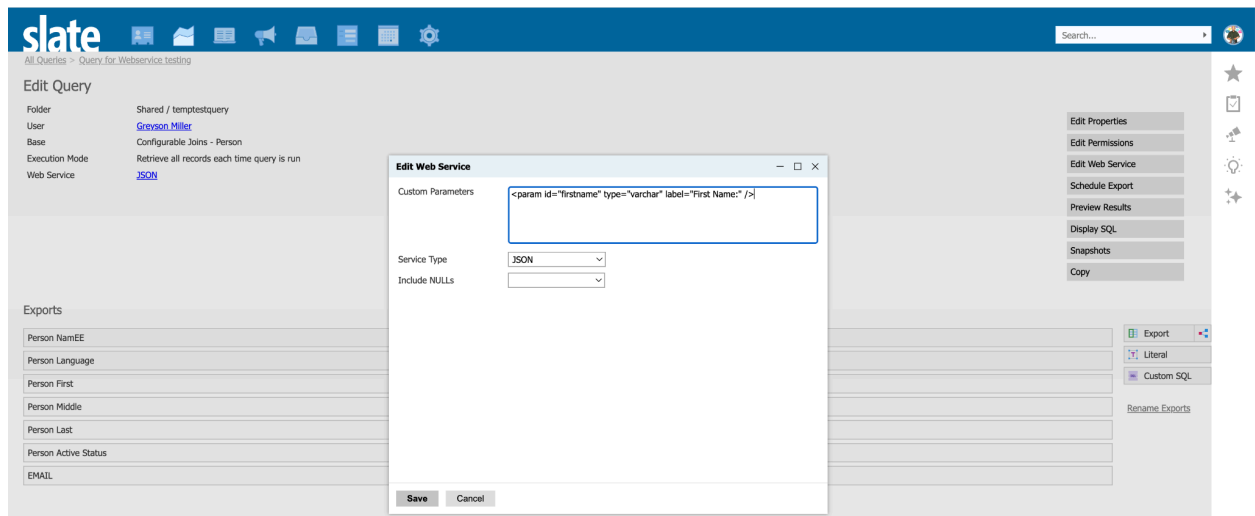
8. Confirm all custom fields have been added to the Query



9. This step is optional, but highly recommended. To enable Guidebook to refresh individual student information on demand, select “Edit Web Service” from the right side menu, and add the following to the “Custom Parameters” textbox:

```
<param id="firstname" type="varchar" label="First Name:" />
```

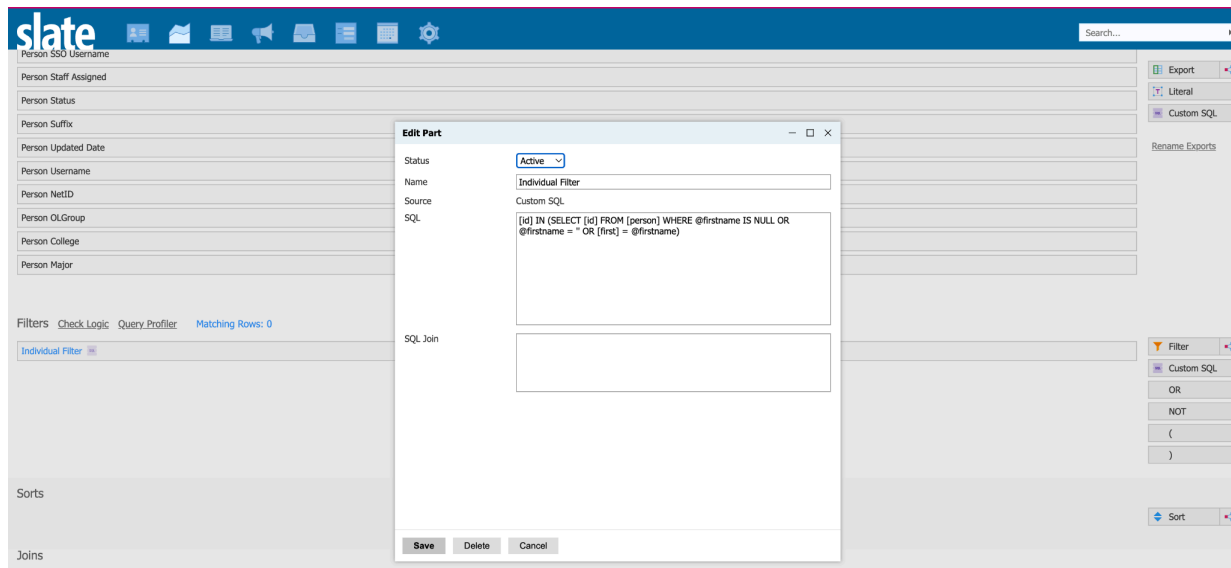
Set Service Type” to “JSON” and click Save.



10. This step is optional, but highly recommended. To enable Guidebook to retrieve fresh individual student data on demand, scroll down to the “Filters” section from within the Guidebook Base Person Query. Select the “Custom SQL” button from the right side menu.

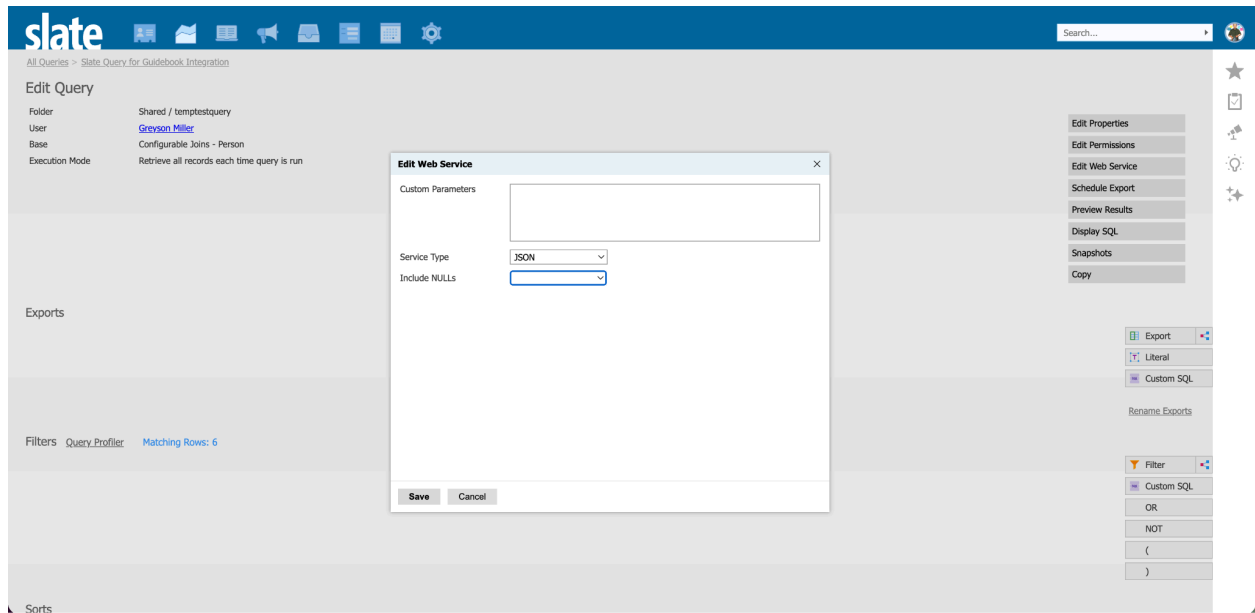
Set Status to “Active”, Name as “Individual Filter”, and enter the following SQL below into the “SQL” textbox. Then click “Save”.

```
[id] IN (SELECT [id] FROM [person] WHERE @firstname IS NULL OR @firstname = "
OR [first] = @firstname)
```

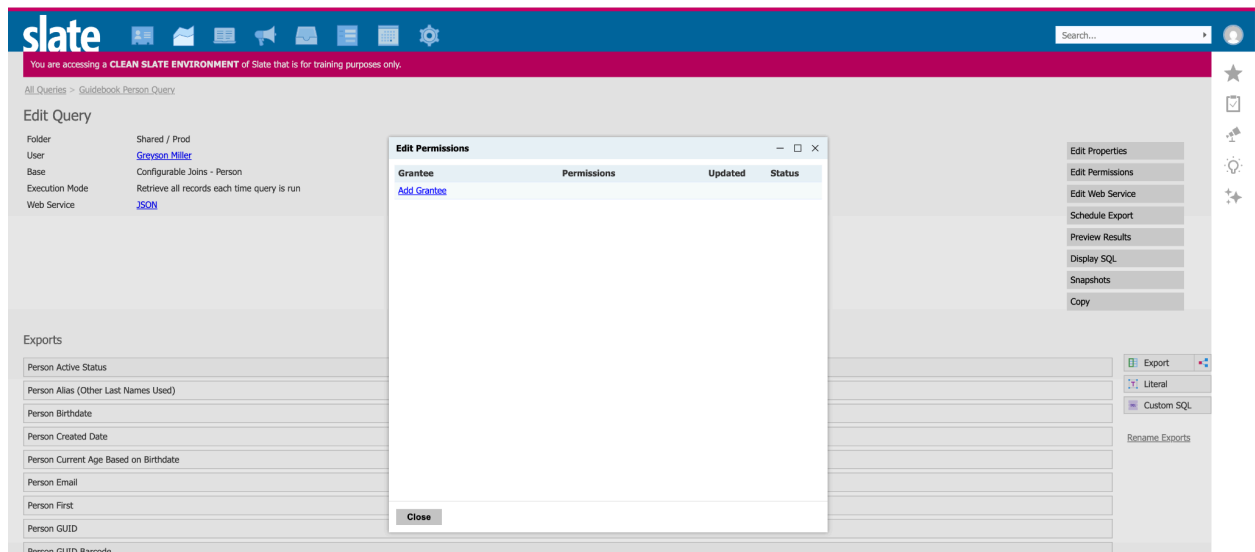


11. If you skipped step 9, this step is required. If you completed step 9, you can move on to the next step.

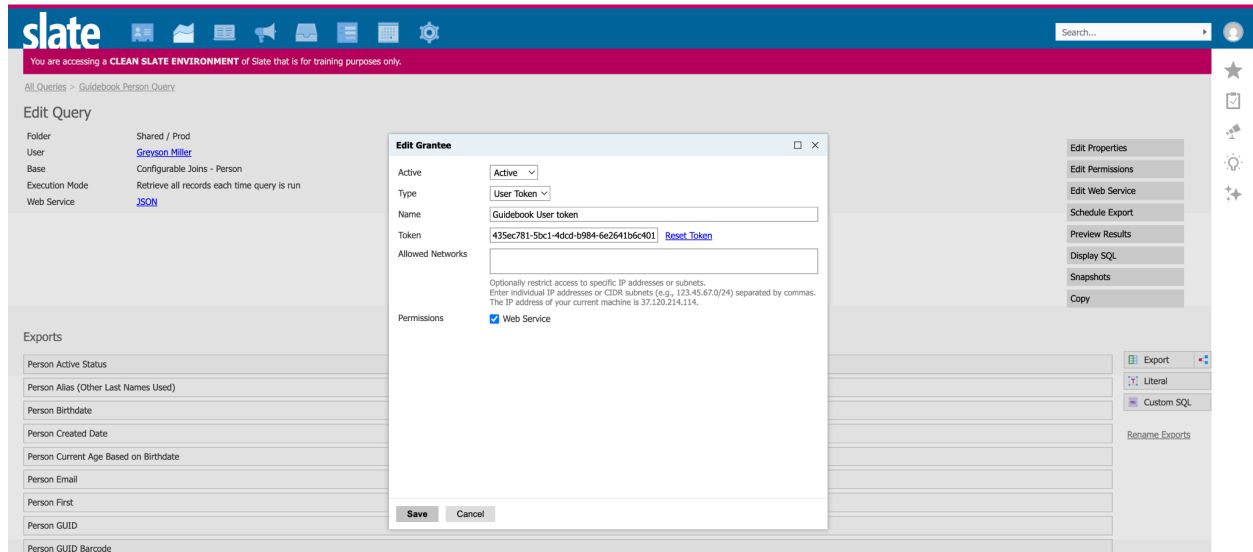
Set the query's output to a web service by selecting "Edit Web Service" from the right side menu. Under "Service Type", choose "JSON".



12. From the Edit Query screen, choose "Edit Permissions" from the right side menu, and add a new grantee.



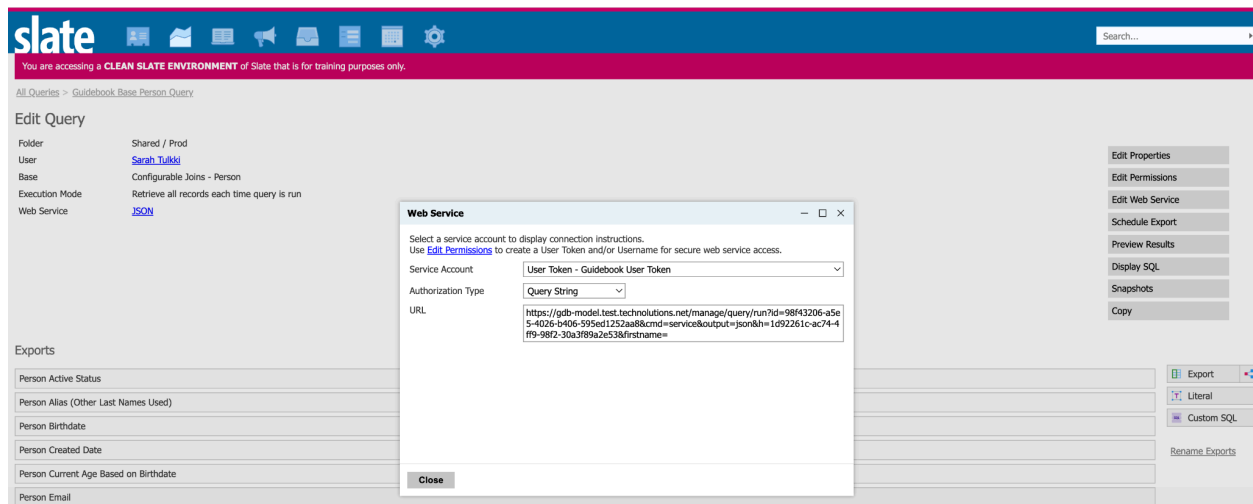
Set the Type to “User Token”, Name the grantee “Guidebook User Token”, and check “Web Service” under Permissions, then Save. This is the service account that authorizes access to the web service.



14. From the Edit Query screen, click on the “JSON” link from the left side menu, and select a service account. Choose the grantee you just created and copy the generated web service URL. It will include a security key as the h= parameter, for example:

<https://slate.youruniversity.edu/manage/query/run?id=XXXX&h=YYYYYYYYY>

Copy and save this full URL. You will paste it into Guidebook Builder in the next section.



Setting Up the Slate Integration in Guidebook Builder

Prerequisites:

Before setting up the Slate integration in Guidebook Builder, all steps from the “Slate Configuration” section above must be completed. Once completed, obtain the following from your Slate environment:

1) **Web Service URL**

- a) This is the HTTPS address of the Slate query web service that returns your student records. Example:
`https://slate.YOURUNIVERSITY.edu/manage/query/run?id=XXX`

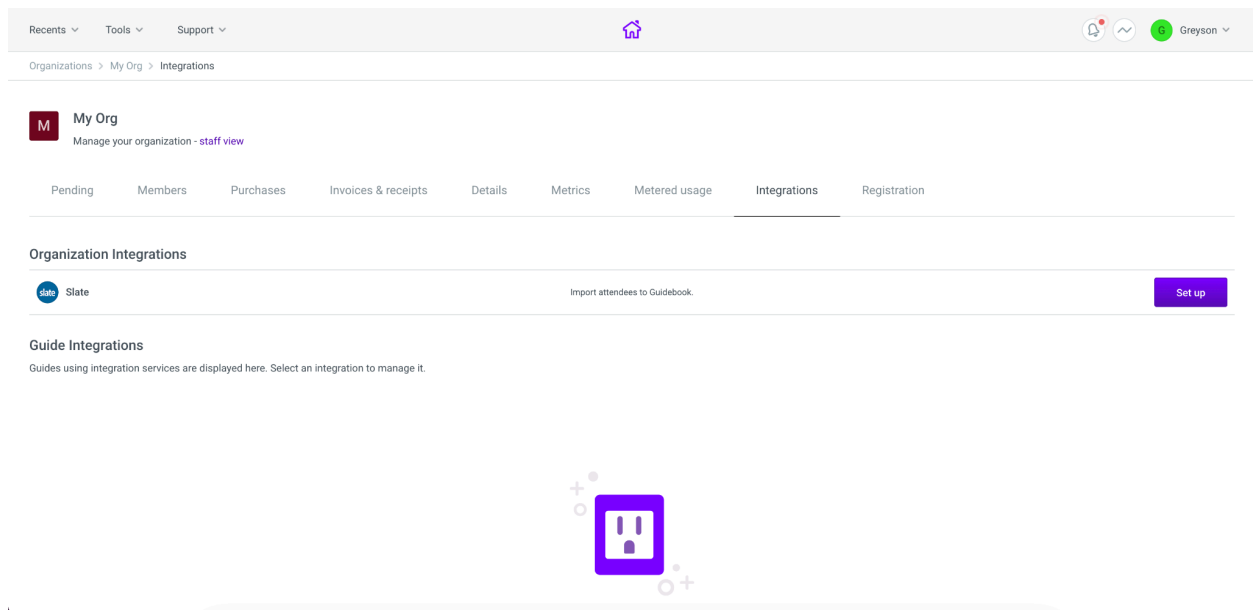
2) **Security Key/Bearer Token**

- a) The value Slate appends to that web service URL for the “h” parameter. This key authenticates Guidebook's requests to Slate.

With your Slate web service URL and security key in hand, log in to Guidebook Builder and navigate to your organization’s “Integrations” tab.

Builder Setup

1. Find the Slate integration in your organization’s “Integrations” tab and click Set up.



2. Paste in your Web service URL and Security key. If your URL already includes &h=..., paste the whole URL — Guidebook will read the key from it.

Recents ▾ Tools ▾ Support ▾

Organizations > My Org > Integrations

My Org
Manage your organization - [staff view](#)

Pending Members Purchases Invoices & receipts

Organization Integrations

Slate

Guide Integrations
Guides using integration services are displayed here. Select an integration to manage

Add Slate Integration

INTEGRATION SETTINGS

Enabled ☐ This enables the integration. If selected, Slate and Guidebook will begin syncing once you save.

Webservice URL
The Slate webservice query URL that returns JSON student records.

Bearer Token
This is found in Slate and ensures a secure connection.

Sync Cadence (Hours)
How often should the integration run, in hours.

Close Test connection Save

3. The default sync cadence for Guidebook to refresh Slate data is every 2 hours. Adjust the cadence here if needed.

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Manage your organization - [staff view](#)

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How often should the integration run, in hours.

Cancel You have unsaved changes. Test connection Save

4. Click “Test connection.” Guidebook will make a test call to Slate and confirm whether the web service is accessible. If there is an issue, an error message will indicate whether it is an authentication or connection problem.

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My Org
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How often should the integration run, in hours.

Cancel You have unsaved changes. **Test connection** **Save**

Connection successful.

5. Once the test succeeds, enable the integration and Save.

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My Org
Manage your organization - staff view

Pending Members Purchases Invoices & receipts

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Slate

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Sync Cadence (Hours)
How often should the integration run, in hours.

INTEGRATION INFORMATION

Last run time Jun 30, 2026 at 10:31am	Last error date & time —
Last run message Synced 563 records: 563 created, 0 updated, 0 failed	Last error message —

Close Test connection **Save**

Slate integration saved and enabled.

As soon as the integration is saved and enabled, Guidebook runs an initial sync automatically. Within a few minutes the integration will show as connected, along with the time and result of the last sync (for example, “Synced 120 records: 120 created, 0 updated”).

Managing the Integration

Once the Slate integration is active, Guidebook syncs with your Slate web service on the cadence you chose (every 2 hours by default), keeping student records up to date.

From the integration settings you can:

- See sync status — the last sync time and result, or the most recent error if a sync failed.
- Update credentials — if your Slate URL or security key changes, update them here. Saving a new URL or key triggers an immediate re-sync.
- Change the cadence — adjust how frequently Guidebook polls Slate.
- Disable the integration — stop future syncs. (Disabling also releases the name lock described below.)

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Organizations > My Org > Integrations

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slate Slate

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Close [Test connection](#) Save

A Note About SAML SSO

As mentioned in the introduction of this document, you will need to have SAML SSO configured so Guidebook can properly link Slate student data to a Guidebook user. If you do not currently have SSO setup, please contact your account manager.

When a user logs into Guidebook via SSO, we receive a response from your system that looks similar to the one below.

It is required that the value of “NameID” reflects the student’s NetID from Slate.

At this time, we do not support email or PersonGUID values for identifying a student in Slate.

```
<saml2:Assertion>
  <saml2:Issuer>https://idp.university.edu/idp/shibboleth</saml2:Issuer>
  <ds:Signature>...</ds:Signature>

  <saml2:Subject>
    <saml2:NameID Format="urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified">
      jsmith123                                <!-- NetID - must match the student's NetID in Slate -->
    </saml2:NameID>
    <saml2:SubjectConfirmation .../>
  </saml2:Subject>

  <saml2:Conditions .../>
  <saml2:AuthnStatement .../>

  <saml2:AttributeStatement>
    <saml2:Attribute Name="urn:oid:0.9.2342.19200300.100.1.3"
      FriendlyName="mail"
      NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:uri">
      <saml2:AttributeValue>jsmith123@university.edu</saml2:AttributeValue>
    </saml2:Attribute>
    <saml2:Attribute Name="urn:oid:2.5.4.42"
      FriendlyName="givenName"
      NameFormat="...uri">
      <saml2:AttributeValue>Jane</saml2:AttributeValue>
    </saml2:Attribute>
  </saml2:AttributeStatement>
</saml2:Assertion>
```

FAQs

How much does it cost?

The Slate integration is part of your standard offerings, and an integrated piece of Guidebook.

Who can set up the integration?

Only organization administrators can configure the Slate integration for that organization. Once set up at the organization level, Slate data will be available in all downstream guides.

How often does it sync?

On the cadence you set (every 2 hours by default). A sync also runs immediately whenever you enable the integration or update its credentials.

Why can't a student edit their name in the Guidebook mobile app?

When the Slate integration is enabled, Slate is the source of truth for student names. A student's name is managed by the integration and kept in sync automatically, so the name field is read-only for them. Disabling the integration releases this lock.

A sync failed — what do I do?

The integration shows the error type (for example, an authentication or connection issue) and a message. Authentication errors usually mean the security key or URL is out of date — update them and re-test the connection. If you're stuck, send us a note at integrations@guidebook.com.

What specifically syncs from Slate?

Guidebook supports syncing the following standard and custom Person fields.

Field Type	Field Name
Standard (included in Suitcase import)	Active Status
	Alias (Other Last Names Used)
	Birthdate
	Created Date
	Current Age Based on Birthdate

Field Type	Field Name
	Email
	First
	GUID
	GUID Barcode
	Last
	Link to Account Login
	Middle
	Mobile Phone
	Name
	Phone
	Portal Link
	Preferred
	Record URL
	Reference ID
	Reference ID (External)
	Reference ID (Internal)
	Reference ID (Override)
	Sex
	SSO Username
	Staff Assigned
	Status
	Suffix
	Updated Date
	Username

Field Type	Field Name
Custom (included in custom Suitcase import)	NetID
	College
	Major
	OLGroup

What if we use custom field names for standard Slate data?

Guidebook only supports syncing the standard Slate field names. Please have your Slate captain make adjustments as needed to send the Slate standard key names for supported Suitcase fields. If there is a need for custom fields, please reach out to your account manager.