# FAQ: Connecting your systems

From the SourceLace manual: Which systems SourceLace connects to, who sets each one up, and what your network needs.

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# Connecting your systems

Which systems SourceLace connects to, who sets each one up, and what your network needs.

## Which systems can SourceLace connect to?

CRM, ERP, HR, finance, service desks, data platforms, databases, files, mail and chat. For example Salesforce, SAP S/4HANA, SAP SuccessFactors, SAP ECC, HubSpot, Dynamics 365, NetSuite, Oracle Fusion, Workday, ServiceNow, Zendesk, Jira, Snowflake, BigQuery, Databricks, Gmail and Outlook, Google Drive, SharePoint and OneDrive, Slack and Microsoft Teams, and your own databases. The full list, with what each one can read and change, is in the manual.

Details: Every system SourceLace connects to.

## Who sets up each system?

For most systems, SourceLace already has the app people sign in with, and your SourceLace admin only adds the source. For some, such as ServiceNow, Zendesk, Snowflake, Databricks, Oracle Fusion Cloud, Workday, NetSuite and databases, an admin of that system does a one-time setup first. Then each person connects once with their own login.

Details: Who sets up what.

## Does adding a source give everyone access to its data?

No. Adding a source only makes it available. Each person still connects it with their own login and sees only what that login can see. With access by group on, people also need a group that allows the source.

Details: Sources.

## Can we connect the same system more than once?

Yes, as many times as your plan and contract allow: a production and a sandbox Salesforce org, several databases, a shared support mailbox next to people's own. Each connection is its own source with its own label, description and sign-ins; adding one never replaces another. On Connections a system with two or more connections gets a heading you can fold away, and **+ Add another** on it (or **Add another <system> like this** in a connection's **⋯** menu) opens the Add a source page with that system chosen and lets you start from an existing connection's settings (never its secrets). Give each connection a label and a short description that say what it is, so people and their AI can tell them apart; when a question could mean more than one, the AI says which it uses, or asks.

Details: Several connections of one system.

## Can I use two mailboxes, such as a shared inbox and my own?

Yes, and you can set up your own second mailbox yourself. Each person has one sign-in per connection, so a second mailbox is a second connection. For a mailbox the team shares (a support inbox), an admin adds a second Google Workspace or Microsoft 365 connection (**Add another** on the group) with a description such as "shared support mailbox", and each person signs in to it with the account they want there. For a mailbox of your own (a second work account, your personal mail), you add it under **My accounts** on **My connections**, give it a label and sign in, with no admin needed once your admin has turned personal accounts on (they are off until then); only you can see and use it, your organization's access and data protection rules still apply, and your admin decides how many accounts each person may add and can switch it off. Either way the AI tells the mailboxes apart by their labels and says which one it used, or asks.

Details: Mail and calendar, Your own accounts.

## Does SourceLace use a shared service account?

Not for most systems. Most use a personal sign-in, so the system applies its own permissions to each person. A few use one shared account that your admin sets up, such as file buckets and some data platforms. SourceLace labels every source "Personal sign-in" or "Shared account" so you always know which.

Details: Personal sign-in and shared accounts.

## What is the redirect URL?

`https://mcp.sourcelace.ai/connect/callback`. Systems where your own admin registers SourceLace ask for it. Register it exactly as shown. Single sign-on to SourceLace itself uses a different address.

Details: The redirect URL.

## What does our network need?

For cloud services, nothing. For systems you run yourself, allow only SourceLace's outbound IP addresses through your firewall, never the whole internet. Ask support for the current list. Systems on a private network are reached by a SourceLace Runner for AI agents (Enterprise plan only, on request), or, for SAP ECC, by the SourceLace Agent or your SAP BTP and Cloud Connector.

Details: What your network needs.

## Can SourceLace reach systems in our data center?

Yes, in a few ways. SAP ECC is reached through the SourceLace Agent, which connects out from your network, or through your own SAP BTP and Cloud Connector. On the Enterprise plan, a SourceLace Runner can run AI agents there. You never open an inbound port to the internet for these.

Details: SAP ECC and Runners.

## Can we connect a system SourceLace has no connector for?

Usually yes, by one of three routes. If the vendor offers its own MCP connection for AI tools, an admin can add it as a source and allow only the tools people may use. If the system has a REST API or a SOAP web service, an admin can describe it without code. Otherwise your developers can build a small connector of their own, which an admin adds as a **Custom connector** source. The first two are Pilot (offered to pilot customers); the connector you build is Available.

These routes read the system through safe calls only, can join other systems in one question (a custom connector when it offers table reads), and are slower than a ready-made connector on a very long list unless your admin tells SourceLace which parameters narrow which fields. A system that can only be read by sending it a database query, or that has no interface for programs, cannot use them.

Details: A system that is not on the list, Any REST or SOAP system, A vendor's own MCP connection and Build your own connector.

## Can we use a vendor's own MCP connection inside SourceLace?

Yes, and governed: SourceLace adds the guardrails an MCP connection does not have on its own (switched on per organization). An admin adds the vendor's MCP address as a source, and people and agents use it in the SourceLace app like any other source, with per-person sign-in to the vendor, an allow-list of the tools anyone may use, the person's approval before any tool that may change data runs, and every call on the record in your audit trail. SourceLace usually registers itself with the vendor's sign-in, so there is no client to create.

Details: Add a vendor's MCP connection.

## What happens when a vendor changes one of its MCP tools?

SourceLace holds it. When the description or arguments of a tool your admin allowed change, the AI is no longer offered that tool and calls to it are refused, until an admin reviews it. Your admins get one email for the source, and **Connections** shows **Tools waiting for review**. The review shows the allowed and new versions side by side; the admin allows the new version or keeps the tool blocked. A harmless change, such as the same arguments in another order, does not hold a tool.

Details: Held tools.

## Should we use a vendor's MCP connection or SourceLace's own connector?

SourceLace's own connector, where there is one. It gives exact answers that span your systems, previews that show a record's current values, and rules per object and field. A vendor's MCP connection can sit beside it as a second source, for tools only the vendor offers. Know its limits first: SourceLace cannot fix the vendor's bugs or outages, "read-only" labels are the vendor's claim, approvals cover the whole call rather than each field, only answers made of records can be combined with other systems, quality varies by vendor, and your agreement with the vendor governs what their side does.

Details: What to know before you add one.

## Should a bucket be searched by names only or by file contents?

Names only, unless people need to find documents by what they say. An admin chooses for each Amazon S3, Azure Storage or Google Cloud Storage source. **Names only** (the default) suits most buckets, and large ones. **Names and file contents** suits a few folders of documents such as contracts or policies: the admin picks those folders and the file types, and each search reads the files there, within clear limits. For a large store your organization already indexes, add its search index as its own source instead.

Details: How S3, Azure Storage and Google Cloud Storage are searched.

## Can we connect our own search index?

Yes, if it runs on OpenSearch, Elasticsearch or Azure AI Search. An admin adds it as a **Search index** source with its address, the index name and how people sign in: each person's own account where the service allows it, otherwise one shared key or login, labelled as a shared account. Searches go to your index live and come back with links to the files. Nothing is copied.

Details: Search index.

## Can I use a Google Sheet?

Yes, once an admin adds a Google Sheets source. Paste the sheet's link into your question. You see only sheets shared with you, and change only sheets you can edit.

Details: Google Sheets.

## What does our Salesforce admin do to connect Salesforce?

There are two ways, and you choose one per source. **SourceLace's app (the default):** your admin installs SourceLace's Salesforce app once per org, from a link support sends, and decides who may use it: usually with a permission set that lists the app. **Your own app:** your admin creates an External Client App in your own org instead, so nothing is installed. Either needs a System Administrator and takes about 15 minutes. People also need the Salesforce permission API Enabled. Then your SourceLace admin adds the source with the org's My Domain address (and, for your own app, its Consumer Key), and each person connects with their own Salesforce login.

Details: What your admin does in Salesforce, and Use your own Salesforce app.

## Can we use our own Salesforce app instead of installing SourceLace's?

Yes. Your Salesforce admin creates an External Client App in your own org (Distribution State Local), allows the scopes `api` and `refresh_token` (and, for Data 360, `cdp_query_api` and `cdp_profile_api`), sets the callback URL to SourceLace's address plus `/connect/callback`, and gives your SourceLace admin the app's Consumer Key. Your SourceLace admin pastes it into the Salesforce source. If the app requires a secret, they also paste the Consumer Secret: it is stored encrypted and never shown again. An app made in another org is refused by Salesforce, so each org (a sandbox too) needs its own. Everyone still signs in with their own Salesforce login, so Salesforce decides what each person sees.

Details: Use your own Salesforce app.

## What does Data 360 need besides Salesforce?

The same Salesforce app (SourceLace's, in a version that includes the two Data 360 scopes, or your own with those two scopes added), and a Data 360 permission set for each person, such as Data Cloud User, with access to the data spaces they should read. Data 360 must be set up in the org. If people are approved through a permission set, they need that one too.

Details: What your admin does in Salesforce for Data 360.

## Can we connect Salesforce Marketing Cloud?

Yes, as a **Pilot**: it is built on Marketing Cloud's documented API and tested against a simulated Marketing Cloud, but not yet tried on a real account, so we offer it to one pilot customer at a time, on request. Ask your SourceLace contact to switch it on. Your Marketing Cloud admin creates a read-only installed package (a Web App) in your own Marketing Cloud account, and your SourceLace admin enters its Client Id and Client Secret on the source: the secret is stored encrypted and never shown again, and nobody at SourceLace needs to receive it. Each person then signs in with their own Marketing Cloud login.

Details: What your admin does in Marketing Cloud and When something goes wrong.

## Can I combine Marketing Cloud with Salesforce in one question?

Yes. Name the data extension by its external key as a table in a question across systems, for example `"sfmc:dev"."Subscribers"`, and join it to a Salesforce object. A data extension that cannot be read to the end is refused, never shown as complete.

Details: Using a data extension in a question across systems.

## What does our database administrator do to connect a database?

Four things, once per database: create one read-only login per person, make sure the database requires encryption, give it a public address whose firewall lets in only SourceLace's IP addresses (ask support for the list), and pass the host, port and database name to your SourceLace admin. The manual has the exact steps for each database, including the managed cloud versions, and a way to check it worked.

Details: For your database administrator.

## How is a MongoDB Atlas cluster connected?

A Project Owner adds a database user per person with the built-in read role, and adds each SourceLace IP address to the project's IP access list. Your SourceLace admin then enters the cluster's host from Connect, Drivers, sets DNS seed list to Yes, and leaves Users are defined in empty or admin. People sign in with their database user, not their Atlas website login.

Details: What your admin does in MongoDB and MongoDB Atlas.

## Can we connect our own S/4HANA or SuccessFactors?

S/4HANA, yes. SourceLace connects to your own S/4HANA as each person's own SAP user: S/4HANA Cloud Public Edition directly, and Private Edition or on-premise systems through your SAP BTP and Cloud Connector or a small SourceLace Agent in your network. People read data and propose changes that apply only after they approve; records are never deleted. Your SAP administrator sets up a few things in SAP first. SuccessFactors: not yet; today SourceLace reads SAP's public SuccessFactors demo sandbox. Tell support how your people sign in to SuccessFactors today.

Details: SAP S/4HANA and What your admin does in SAP S/4HANA Cloud Public Edition. If sign-in shows a grey browser login box, SAP's sign-in page is on your system's UI address: set **Sign-in address** on the source.

## Why can't SourceLace use one of our S/4HANA Cloud APIs?

SourceLace signs in to S/4HANA Cloud with OAuth 2.0 only. If the communication scenario behind an API offers only user name and password or a certificate, SourceLace cannot use that API, and it never keeps an SAP password. Your SAP administrator can check which authentication methods a scenario offers, and look for another API for the same data that offers OAuth 2.0.

Details: When a scenario has no OAuth 2.0.

## Which SAP interface types can SourceLace use with S/4HANA Cloud?

OData V2 and, on the direct sign-in, OData V4 (reads only). A communication arrangement often lists OData V2, OData V4, SOAP, IDoc and RFC services side by side; SourceLace uses the OData rows, and the arrangement still works for them. The **Application Protocol** column on the arrangement's **Inbound Services** says which each row is. Prefer rows not marked **Deprecated**. A V4 service is added as `group/service/version`, such as `api_product/product/0001`, taken from its Service URL.

Details: Which SAP interfaces SourceLace can use and Adding an OData V4 service.

## What do our SAP teams do to connect SAP ECC?

Through the SourceLace Agent: your IT department installs the agent and makes its certificate authority, and your SAP Basis team trusts it in STRUST, maps certificates to SAP users with CERTRULE, and activates the Gateway services. Through SAP BTP: your BTP and Basis teams set up principal propagation in Cloud Connector, a destination, an address that publishes the services, and a sign-in client. The manual has every step, with how to check each one.

Details: What your admin does in SAP.

## What does our Datasphere admin do to connect SAP Datasphere?

A DW Administrator adds an OAuth client with the purpose Interactive Usage and SourceLace's redirect URL in App Integration, and copies its id, secret and the Authorization URL to your SourceLace admin. People must be members of the spaces they read, and views must be exposed for consumption.

Details: What your admin does in SAP Datasphere.

## What does our Snowflake admin do to connect Snowflake?

An ACCOUNTADMIN creates a security integration named SOURCELACE with SourceLace's redirect URL (the manual has the exact command), copies its client id, adds SourceLace's IP addresses to any network policy, and makes sure people have a warehouse they may use. Your SourceLace admin then enters the account URL from Snowsight's View account details, the client id and a warehouse.

Details: What your admin does in Snowflake.

## What does our Google Cloud admin do to connect BigQuery?

Nothing is registered: SourceLace provides the Google app. Your Google Cloud admin gives people BigQuery Job User on the project that runs queries and BigQuery Data Viewer on the datasets they read, and, if your Google Workspace restricts third-party apps, a super admin trusts SourceLace's app. Your SourceLace admin enters the project ID, not its name or number.

Details: What your admin does in Google Cloud.

## What does our Databricks admin do to connect Databricks?

An account admin adds an app connection named SourceLace in the account console, with SourceLace's redirect URL, All APIs and no client secret, and copies its client ID. People need Can use on a Databricks warehouse and Unity Catalog grants on the data. Your SourceLace admin enters the workspace address (not the account console), the client ID and the warehouse ID.

Details: What your admin does in Databricks.

## Does connecting Snowflake or Databricks cost anything when nobody is asking questions?

No. SourceLace keeps no connection open to either and does not check them on a timer, so it uses none of your warehouse between questions. When someone asks a question, looks up tables or columns, or an admin tests the connection, SourceLace sends a statement that runs on your warehouse like any other, and your Snowflake or Databricks agreement decides what that costs. SourceLace cannot tell you the amount.

Details: Snowflake and Databricks.

## What do our Amazon admins do to connect Amazon Redshift?

Your Redshift admin creates one database user per person, named exactly like their SourceLace email in lower case, with no password. Your Amazon cloud admin creates a role SourceLace may take on, whose trust policy names SourceLace's account (from support) and your external ID, and which may get credentials only for those users. Redshift Serverless also needs the trust policy to allow session tags. Your SourceLace admin enters the region shown at the top right of the Redshift console, the cluster or workgroup, the database and the role.

Details: What your admin does for Amazon Redshift.

## What do our Amazon admins do to connect Amazon Athena?

Your Amazon cloud admin creates an Athena workgroup with a per-query data limit and somewhere to keep results (Athena managed results are simplest), and a role SourceLace may take on that can query it and read your tables. Everyone who uses the source shares that role. Your SourceLace admin enters the region, the workgroup and the role.

Details: What your admin does for Amazon Athena.

## What do our Microsoft admins do to connect Fabric or Synapse?

A Microsoft Entra admin approves SourceLace once for the Azure database permission (Grant admin consent), since most organizations do not let people approve apps themselves. Your Fabric or Synapse admin gives people access to the warehouse or database, and for Synapse adds SourceLace's addresses to the workspace firewall. Your SourceLace admin enters the server from the connection string, the database and your tenant, which guests from other organizations need.

Details: What your admin does in Microsoft Entra, Fabric and Synapse.

## What does our HubSpot admin do to connect HubSpot?

Nothing is registered: SourceLace provides the HubSpot app. HubSpot lets only Super Admins, and users with the App Marketplace access permission, approve an app, so a Super Admin connects first or gives people that permission. People see only the records their own HubSpot permissions allow. Your SourceLace admin can enter the HubSpot account ID so nobody connects another account.

Details: What your admin does in HubSpot.

## What do our Microsoft admins do to connect Dynamics 365?

A Microsoft Entra admin approves SourceLace once (Grant admin consent), since most organizations do not let people approve apps themselves. Each person needs a Dynamics 365 licence, and must be a user of the environment with a security role, which a Power Platform admin gives. Your SourceLace admin enters the Environment URL from the Power Platform admin center.

Details: What your admin does in Microsoft.

## What do our admins do to connect Dynamics 365 Finance and Supply Chain?

Two admins, once per environment. A Microsoft Entra admin approves SourceLace's **Microsoft Dynamics ERP** permission (Grant admin consent). A Finance and Supply Chain administrator adds SourceLace's client ID under **System administration, Setup, Microsoft Entra applications**; without it the environment refuses every sign-in. Each person then needs a licence and an enabled user with security roles in the environment. Your SourceLace admin enters the environment address, up to `.dynamics.com`. This is not the Dataverse source: Dataverse holds the CRM tables, this holds finance, purchasing and inventory. It is read-only and still in testing.

Details: What your admin does in Dynamics 365 Finance and Supply Chain.

## What does our NetSuite administrator do to connect NetSuite?

Turn on REST Web Services and OAuth 2.0, install SourceLace's integration with the Application ID from support, and give people's everyday role the REST Web Services and Log in using OAuth 2.0 Access Tokens permissions. Without those two permissions NetSuite refuses every request with "Invalid login attempt". Your SourceLace admin enters the Account ID.

Details: What your admin does in NetSuite.

## What do we need to connect Gainsight or ChurnZero?

For Gainsight, a Super Admin makes an access key (Administration, Connectors 2.0) and tells your SourceLace admin your Gainsight address. For ChurnZero, ChurnZero first switches on its REST API (an add-on), then an admin makes a user whose permissions are only Developer Tools and Bulk Read, with an API key. Both are shared accounts: everyone who may use the source acts as that one key, so narrow who can use it with access by group. SourceLace only reads. Both are pilots, not yet tried on a real account.

Details: Customer success platforms.

## Can Gainsight or ChurnZero be joined with our CRM in one question?

Yes, for Gainsight objects (such as Company) and ChurnZero entities (such as Account): name them as tables in one question across your systems, next to Salesforce, HubSpot, a service desk or a database. Gainsight CTAs and success plans cannot be joined this way (read them on their own), Gainsight reads at most 100 fields of an object at a time, and when an object or entity is larger than SourceLace reads in one question, the answer says it is incomplete.

Details: Gainsight and ChurnZero in one question across systems.

## Can Flexport, Finance and Supply Chain or remittance advice be joined with our other systems in one question?

Yes. Flexport invoices and shipments, Dynamics 365 Finance and Supply Chain data entities and one remittance advice from your clearinghouse can each be a table in one question across your systems. Finance and Supply Chain is read across every company the person can reach (its `dataAreaId` column says which), a remittance table needs the advice's id in the question, and a very large list is read only up to a limit, which the answer says.

Details: Flexport, Finance and Supply Chain, remittance advice.

## What do we need to connect Flexport?

Someone with access to your Flexport account makes an API key in the Flexport portal (Your Business, Settings, the API tab) and gives it to your SourceLace admin. There is no address to enter. It is one key for the whole organization, it only reads, and it sees only the freight Flexport handles for you. It is still in testing.

Details: Logistics: Flexport.

## Who in Gong can connect Gong?

Only a Gong technical administrator, and they must approve every permission Gong lists. The access is company-wide: everyone who may use the source sees all calls and transcripts, so narrow who can use it with access by group.

Details: What your admin does in Gong.

## What does our Oracle admin do to connect Oracle Fusion?

An Identity Domain Administrator registers a confidential application for SourceLace with Authorization code and Refresh token, SourceLace's redirect URL and your Fusion environment's scope, activates it, and copies the client ID, secret and scope to your SourceLace admin. Test and production environments each need their own scope.

Details: What your admin does in Oracle.

## What does our Workday admin do to connect Workday?

A Workday security administrator runs Register API Client with SourceLace's redirect URL and the functional areas people should read (System for Workday Query Language), then copies the client ID, secret and two endpoints from View API Clients. The sign-in host differs from the REST API host: copy both.

Details: What your admin does in Workday.

## What does our Google Workspace admin do to connect Google Drive or Google Sheets?

Nothing is registered: SourceLace provides the Google app. Only if your organization restricts third-party apps does a super admin mark SourceLace as Trusted in the Google Admin console (API controls), once. People see only files and sheets shared with them; changing a sheet needs Editor access.

Details: What your admin does in Google Workspace.

## What does our Microsoft admin do to connect SharePoint and OneDrive?

An Entra admin approves SourceLace once (Grant admin consent), since most organizations do not let people approve apps themselves. People need a licence that includes SharePoint and OneDrive, and must have opened OneDrive once, which is when Microsoft creates it.

Details: What your admin does in Microsoft 365.

## What does our Amazon cloud admin do to connect Amazon S3?

Write down each bucket's name and its region (on the bucket's Properties tab), create a read-only policy, and either an access key for SourceLace or a role whose trust policy names SourceLace's account and your external ID. Buckets in different regions need separate sources. Everyone who may use an S3 source reads with that one access.

Details: What your admin does for Amazon S3.

## What does our Azure admin do to connect Azure Storage?

Give people Storage Blob Data Reader on the storage account or its containers (Owner and Contributor do not include reading data), allow SourceLace's addresses if the account limits networks, and have an Entra admin approve SourceLace once. Your SourceLace admin enters the account name and the containers.

Details: What your admin does in Azure.

## What does our Google Cloud admin do to connect Cloud Storage?

Give people Storage Object Viewer on each bucket, and, if your Workspace restricts apps, trust SourceLace in the Google Admin console. With your own OAuth client, set its audience to Internal or publish it: in Testing, sign-ins end after 7 days.

Details: What your admin does in Google Cloud.

## What does our Google Workspace admin do to connect Gmail and Google Calendar?

Nothing is registered: SourceLace provides the Google app. If your organization restricts third-party apps, a super admin marks SourceLace as Trusted in the Google Admin console (API controls). People need Gmail turned on for their organizational unit, and tick every box on Google's page when they connect. Making drafts (Gmail) and changing sheets (Google Sheets) are asked for only where an admin turns them on.

Details: What your admin does in Google Workspace.

## What does our Microsoft admin do to connect Outlook mail and calendar?

An Entra admin approves SourceLace once (Grant admin consent) if people may not approve apps themselves. Mailboxes must be in Exchange Online: a mailbox on an on-premises Exchange server cannot be read.

Details: What your admin does in Microsoft 365.

## What does our Slack admin do to connect Slack?

If your workspace requires app approval, or you are on Enterprise Grid, a Slack admin approves SourceLace in Manage apps (or Apps Manager). Optionally, your own internal Slack app avoids Slack's lower reading limits for apps outside its Marketplace; support sends the manifest.

Details: What your admin does in Slack.

## Why does Teams need a Microsoft admin?

Reading channel messages, meeting transcripts and recordings needs permissions that Microsoft always asks an admin to approve. An Entra admin grants admin consent once. To start without an admin, set Read channel messages to Off: people can then read their chats.

Details: What your admin does in Microsoft Teams.

## What does our ServiceNow admin do to connect ServiceNow?

Register SourceLace once in System OAuth, Application Registry, as a Public Client with SourceLace's redirect URL, and copy its Client ID. Leaving Public Client unticked is the most common reason sign-in fails. Your SourceLace admin enters the instance name, the part before .service-now.com.

Details: What your admin does in ServiceNow.

## What does our Zendesk admin do to connect Zendesk?

Create an OAuth client for SourceLace in Admin Center (Apps and integrations, APIs, OAuth Clients), of kind Public, with SourceLace's redirect URL, and copy its Identifier. Your SourceLace admin enters the subdomain from Brands: your help centre's own address does not work for sign-in.

Details: What your admin does in Zendesk.

## What does our Atlassian admin do to connect Jira?

Usually nothing: SourceLace provides the Atlassian app. If your organization blocks outside apps, an org admin allows SourceLace under Security, External apps. People need Jira access on the site, and choose it under Use app on when they connect.

Details: What your admin does in Atlassian.

## What does our Trino or Starburst admin do to connect Trino?

With password sign-in, nothing: people use their own Trino login. For OAuth, register a client for SourceLace in your identity provider or Galaxy, with SourceLace's redirect URL; with Microsoft Entra ID, the source's scope must be Trino's own app scope. On Galaxy, use the cluster's host, not the account's.

Details: What your admin does in Trino or Starburst.

## What does our Amazon cloud admin do to connect lake tables?

Create a read-only policy for the tables' bucket and folder (and Glue, if used), and a role SourceLace may take on with your external ID. Read files directly must be switched On, and only for tables with no row or column rules: the source reads nothing until then.

Details: What your admin does for lake tables.

## What does our EHR team do to connect health records?

On Epic and Oracle Health, SourceLace has already registered its own app, so they do not register anything: they activate SourceLace's app in their own system, using the client ID SourceLace support gives them (Epic's analysts download the app by its client ID; Oracle Health's administrator makes it available in the domain and chooses who may use it), and send your SourceLace admin the FHIR R4 base URL. Your SourceLace admin then only enters that address. MEDITECH and other EHRs still need an app registered for SourceLace, which is also the advanced option on Epic and Oracle Health if your organization wants an app it owns. Use test systems only until a business associate agreement is signed.

Details: What your EHR team does.

## Do we have to register an app with Epic or Oracle Health ourselves?

No. SourceLace has its own app with each of them, so your EHR team only activates it in your system and your SourceLace admin enters the FHIR base URL. Register an app of your own only if your organization requires one it owns, or for MEDITECH and other EHRs: it goes under **Client ID (bring your own app)** on the source. SourceLace's app is a public client with no secret, and each clinician still signs in with their own EHR login.

Details: Advanced: bring your own app.

## What goes in the FHIR source's Scopes field, and where do I pick SMART v1 or v2?

Normally nothing: leave **Scopes** empty and SourceLace asks the EHR for its default list of read scopes. Pick the SMART version (automatic, v1 or v2) in the separate **Scope syntax** field; for Oracle Health, choose the SMART version of the app your Oracle Health administrator enabled (with SourceLace's own app, this also picks which of its two apps is used). Typing automatic, v1 or v2 into **Scopes** is refused with a message that points you to **Scope syntax**. Fill in **Scopes** only when your EHR team allowed the app fewer scopes than the default list.

Details: Add the source.

## Do the healthcare pack's agents work with Oracle Health?

Only the eligibility check. Oracle Health does not offer hospital-wide encounter or appointment searches: it searches encounters, conditions and insurance coverage one patient at a time, appointments one clinic, patient or practitioner at a time, and it cannot search encounters by class (inpatient or outpatient). The admissions digest, care gap list, readmissions watch, readmission alert and discharge follow-up check need those searches, so they are left out when you choose an Oracle Health source, and the pack says why. The eligibility check works one clinic at a time once you fill in its **Clinic locations** with your clinics' FHIR Location ids. For a short list of patients, the pack's skills (such as the readmission review) still work when you give their FHIR ids. Epic and MEDITECH publish the searches these agents use, but they have not been tried on those systems yet; if one is refused, the agent stops and says so. Use the pack with test data only until business associate agreements are in place: using it does not meet HIPAA's requirements for you, and a qualified person decides what to do with every result.

Details: Which healthcare agents work with your EHR.

## A health records search says it "took too long". What do I do?

The EHR gave up on a search that asked for too much at once. Trying the same search again gives the same answer, so make it smaller: use a shorter date range (about a week at a time for appointments), or, for a patient's conditions, ask only for the active ones. Oracle Health in particular times out on long appointment date ranges. Use test data only until a business associate agreement is signed.

Details: When something goes wrong.

## What do we need to connect a healthcare clearinghouse such as Stedi, Availity or Optum?

Connect the clearinghouse your organization already uses. **Stedi:** an Admin or Developer of your Stedi account makes an API key (Developer settings, API keys). **Availity:** someone in Availity's developer portal creates an app, subscribes it to the HIPAA transaction APIs (the free Demo plan for testing) and copies its client ID and secret. **Optum:** Optum gives your organization a client ID and secret, separate ones for its sandbox and for production. Your SourceLace admin enters them; there is no address to enter. It is one credential for the whole organization, and SourceLace only reads with it: eligibility and claim status from all three, remittance from Stedi and Optum, never claim submission. Use test data only (a Stedi test key, Availity's Demo plan or Optum's sandbox): SourceLace has no business associate agreement program yet and does not claim HIPAA compliance. Patient details are masked by default. Tested against each vendor's real test system: eligibility through Stedi, eligibility and claim status through Availity's Demo plan, and eligibility, claim status and remittance through Optum's sandbox; the rest is still in testing. Optum's claim status also needs the provider's tax ID and the patient's date of birth.

Details: Healthcare claims.

## What do our developers do to run a custom connector?

They build a small web service that follows SourceLace's connector protocol, give it the shared secret your admin made, and run it on a public https address. The admin enters the address before /sourcelace/v1. A check command shows whether every part works before the source is added.

Details: What your developers and IT do.

## Can a system we connected with the Connector SDK be joined with our other systems?

Yes, when its connector offers the optional table read (`scan`). Your developers add it as described in the connector chapter; connectors without it work as before, and a question that names their tables is told to ask them on their own first. A table that cannot be read to the end is refused, never shown as a complete answer.

Details: Scan (optional).

## What does the system's admin do to connect a REST or SOAP API?

They find the API's description (an OpenAPI file, or a WSDL for SOAP) and your own API address. For each person's own sign-in, they register an OAuth app with SourceLace's redirect URL and read scopes; for a shared key, they create a read-only key and note where the API expects it.

Details: What the system's admin does.

## How do I make a long list from a REST or SOAP system, or a vendor's tools, faster in a question across systems?

A SourceLace admin can tell SourceLace which of the system's parameters narrows which field. For example, field `status` is narrowed by the parameter `status`, so "open invoices" asks the system for only the open ones (about 240 records) instead of all 40,000. On **Connections**, choose **Edit** on the source and open **Filters the source can apply**; the form has a dropdown for each part, a worked example, and a **Test** button. A filter is used only after its test passes, and without filters everything still works, only slower on long lists. A JSON version of the same list is under **Edit as JSON (advanced)**.

Details: Filters you declare and Filters for a tool.

## What does the vendor's admin do for a vendor's MCP connection?

Usually only allow the connection in the vendor's admin settings, and give you the vendor's Streamable HTTP address (often ending in /mcp, not /sse). SourceLace registers itself with the vendor's sign-in; if the vendor does not allow that, the admin registers an OAuth client with SourceLace's redirect URL.

Details: What the vendor's admin does.

## What does our search admin do to connect Azure AI Search, Elasticsearch or OpenSearch?

For Azure AI Search with each person's own sign-in, they turn on role-based access, give people Search Index Data Reader, and register an app in Microsoft Entra. For Elasticsearch, they copy the Elasticsearch endpoint (not Kibana's) and create a read-only API key, whose Encoded value goes into SourceLace. They also note the index's field names.

Details: Prepare the index.

## What do Verified, Available and Pilot mean?

**Verified** connectors have been tested on a real account. **Available** connectors are built on the vendor's published interface and validated in your environment during onboarding; most connectors are Available. **Pilot** connectors are new or partial, offered to pilot customers. Tell support before you start with an Available or Pilot connector, so we can help with the first connection.

Details: Every system SourceLace connects to.

## Do the logos mean those vendors endorse SourceLace?

No. The app and our website show each system's logo only so you can recognize the systems you connect. The logos and names belong to their owners, and showing one does not mean that company sponsors or endorses SourceLace. A system without a logo shows its initials instead.

Details: Sources.

## Why does the list of sources show only some of them?

A list that offers a source to choose shows ten at a time, so it stays fast when an organization has many. The line under it says how many there are ("Showing 10 of 24"). Type a few letters of a name to narrow the list, or press **Show more** for the next ones. Sources you can use now come first; those marked **needs sign in** are listed after them until you connect them. Outside the admin pages, you only see sources you are allowed to use.

Details: Choosing a source from a list.

## Why does a connection have no Disconnect, or no Connect?

**Disconnect** only forgets your own sign-in, so it is offered only for a connection you signed in to with your own login. A connection that uses a **shared account** is one your admin set up for everyone: it has no **Disconnect**, and the menu says "Uses the account your admin set up. Only an admin can change it." **Connect** is offered only while you still need to sign in: it sits in the **Status** column, beside **Needs sign-in**, or beside **Not connected yet** for a shared account you have not used yet, which needs one press of **Connect** and no login page, and then nothing more to do.

Details: Your sources page.