

IDataHub Slate-Banner Connector IT Overview

*IData - Helping higher education institutions be
successful through effective data management and
innovative technology*



Introductions

- **Brian Parish**

- IData, CEO and Founder
- bparish@idatainc.com



- **Jess Critchlow**

- IDataHub Sales and Partnerships
- jcritchlow@idatainc.com



Agenda

- IData Background
 - Evaluating Productized Connector vs DIY
 - IDataHub Technical Overview
 - Overview of Data Banner Flow
 - What about Ethos?
 - IT Implementation Roles & Responsibilities
 - Additional Resources & Next Steps
-

IData Background

THE **I**NSTITUTIONAL **D**ATA COMPANY

About IData



System Integration

Products



enterprise service bus
& connector catalog

Services

integration services for
institutions and vendors

Reporting & Data Governance

Products



Services

reporting
data warehousing
data governance

strategic and technical
consulting

Technology Consulting

Services

implementation
data migration
strategic planning
custom development
staff augmentation

strategic, technical, and
project management
consulting

higher education data
system expertise

Serving
Higher Ed
Since 2004

Clients:
600+ Institutions

Partners:
30+ Vendors



Partnership across the integration



Clients – 600+ Institutions



Evaluating Packaged Connectors vs DIY

Integration Comparative Approach

DIY Model



IData Packaged Connector Model



IDataHub

ENTERPRISE SERVICE BUS

Integrations as Apps

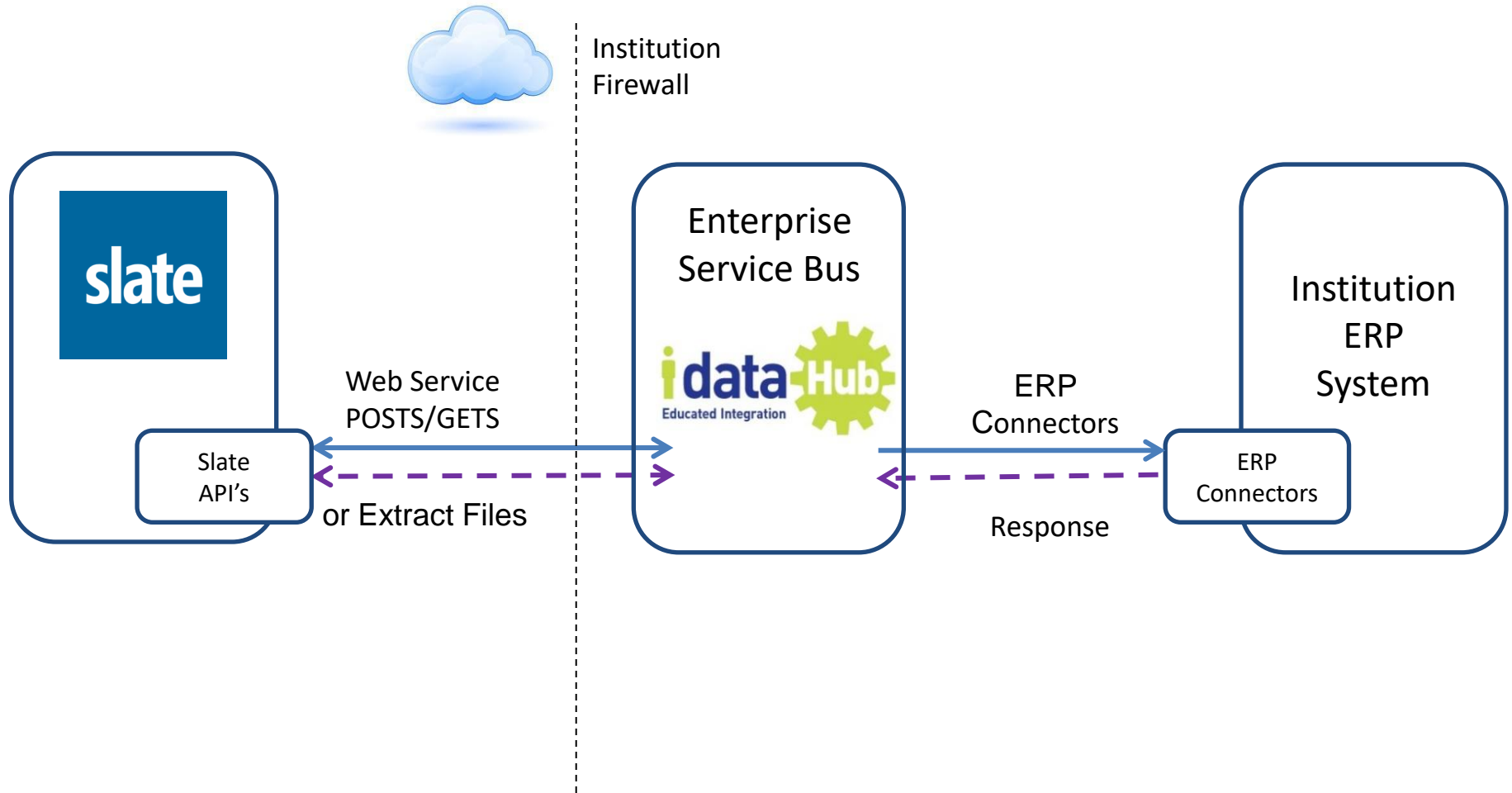
Packaged Integrations (Hubbits)

IDataHub

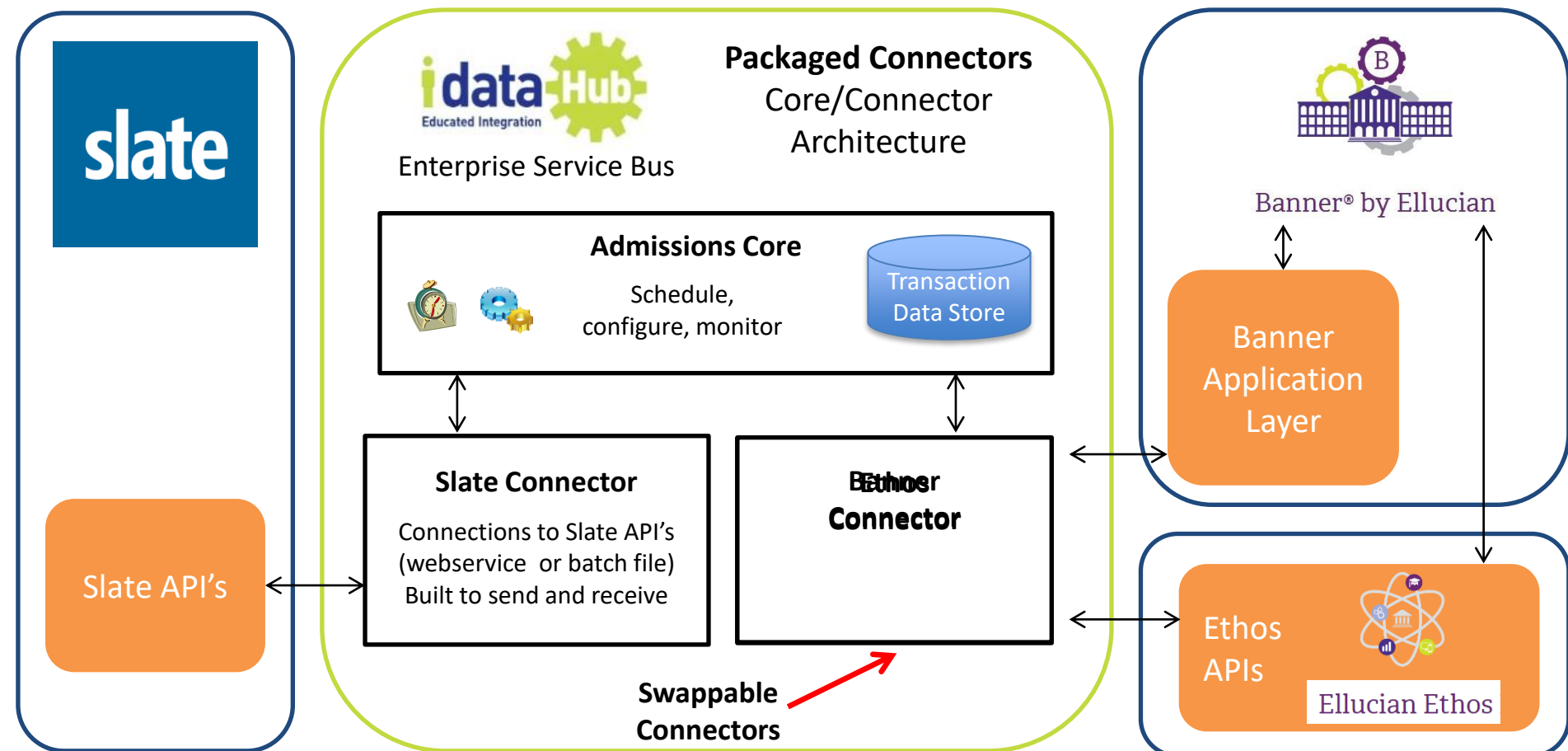


- Packaged, configurable, extendable
- Facilitate self-service and reduce implementation time

The IDataHub in a nut-shell



IDataHub Core/Connector Architecture



Procedure Groups

* Ethos Integration

* Data Agents

Admissions

Admissions CRM Connectors

Admissions Core

Admissions ECM Connectors

Admissions Metrics

Slate Integration Metrics

Slate-Banner Import Metrics

Slate-Colleague Import Metrics

Today's Admissions Import Metrics

Yesterday's Admissions Import Metrics

Admissions SIS Connectors

Admissions Utils

Duplicate Resolution

New Procedure

New Group

Upload Procedure

Slate-Banner Import Metrics

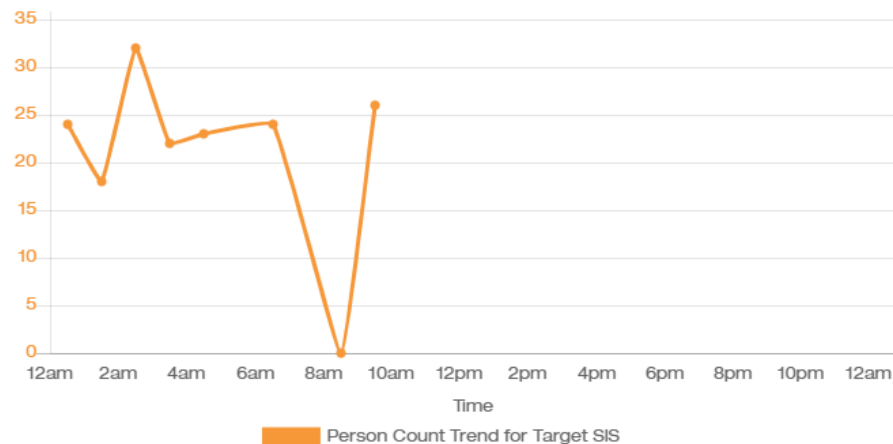
Total Slate Indicators: 2019-07-11

Average Procedure Duration	1777.27
Available Disk Space	71%
Total Persons Count	244

Banner Indicators: 2019-07-11

Target Persons Count	169
Target SIS Connection Failure	0
Target Persons Edit Errors	9%
Target Persons Insertion Errors	0%
Target Average Record Insertion Time	44.992

Number of Slate Person records processed by run for Banner



Cumulative Slate Person records processed by run for Banner



Run Now or Scheduling

Procedure

Tasks

Task Properties

Logs

Schedules

Monthly at 02:00 on the 1st of the month

Notes

Smart Catalog Weekday Scheduler

Schedule Type

MONTHLY

Time of Day

2:00

Day of Month

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

last of month

Save

Reset

Delete

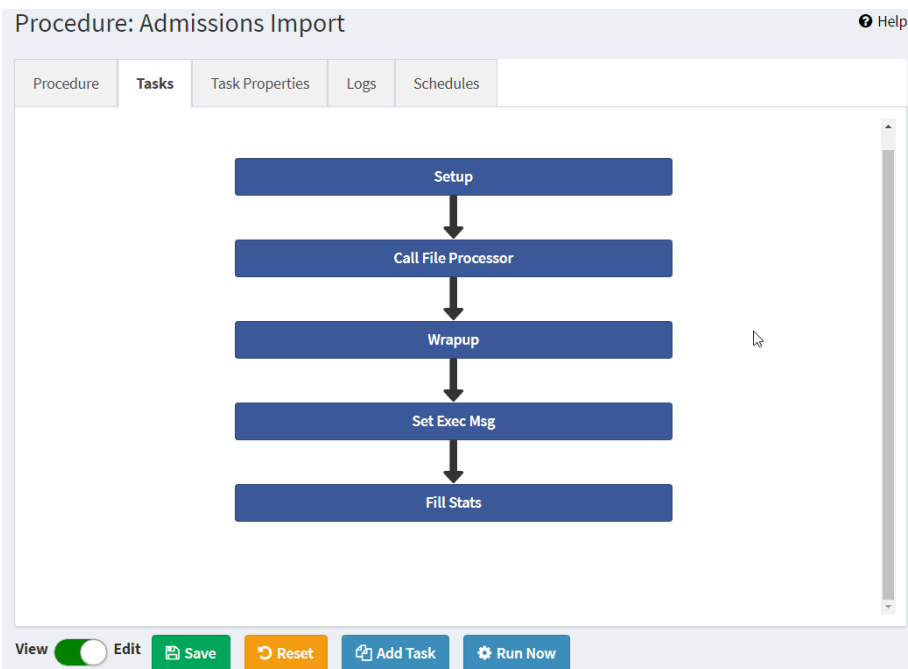
View

Edit

Add Schedule

Run Now

IDataHub Procedures and Automation



Schedules: Admissions Import

Every 15 minutes on S M T W T F S

Notes

Schedule Type MINUTE

Weekdays Sun ✓ Mon ✓ Tue ✓ Wed ✓ Thu ✓ Fri ✓ Sat ✓

Repeat Minutes 15

Save Reset Delete

View Edit Add Schedule Run Now

Configurations, Translations, and Routing

Procedure: Slate Agent Configuration

slate

Help

Procedure Tasks Task Properties Logs Schedules

Description The tasks in this procedure apply globally to processing between Slate and the CRM-Core database.

Notes Important: Do not set the properties the Slate Configuration Example procedure. Create a copy, named Slate Configuration, and set the configuration properties in the copied procedure. For instructions for copying a procedure, refer to the IDataHub User's Guide.

Assigned Groups *Admissions > Admissions CRM Connectors > Slate

Procedure Types Config-only

Logo/Icon Slate

Tasks

Task Name	Task Type	Description
1 Connector Settings	Configuration Container	Holds user-defined properties for use in other Tasks and Procedures
Slate File	Configuration Container	Holds user-defined properties for use in other Tasks and Procedures

View ☐ Edit ☒ [Copy](#) [Download](#)

Procedure: Admissions Indicator Config

Procedure Tasks Task Properties Logs Schedules

Connection

Server *	<input type="text" value="smtp.gmail.com"/>
Port	<input type="text"/>
Encryption *	<input type="text" value="STARTTLS"/>
Authorization	<input type="text" value="true"/>
Userid *	<input type="text" value="devtest@idatainc.com"/>
Password	<input type="password" value="*****"/>
Timeout	<input type="text" value="60000"/>

View ☒ Edit ☐ [Save](#) [Reset](#) [Copy](#) [Delete](#) [Add Task](#) [Layout](#) [Download](#)

[Procedure List](#) | [Documentation](#) | [Task Types](#) | [Contact Support](#)

idataHub
IData Demo
bparish (logout)

> [Procedure List](#) > [Procedure: CRM - TRANSLATION TABLES](#)

Previous Task:

PROGRAMS

Next Task: [COUNTRIES](#)

Task Type: Configuration Container ([Help](#))

Notes:

[Edit All](#) [Save All](#) [Cancel All](#)

Translations				
	Source	Translation		
1	Mathematics	MATH		
2	Science	SCIE		
3	English	ENGL		
4				
5				
6				
7				
8				

Duplicate Resolution

[Procedure List](#) | [Documentation](#) | [Task Types](#) | [Users](#) | [Contact Support](#)

My Forms: [Transaction Inspector](#)



IData University
[louis](#) (logout)

Transaction Inspector

Txn	Last Name	First Name	Colleague ID	Field Group	Status
1234	Nimble	Jack	0123456	PERSON	AMBIGUITY
1234	Nimble	Jack	0123456	ADDRESS	AMBIGUITY
1234	Nimble	Jack	0123456	APPLICATION	AMBIGUITY
1235	Wheels	Helen	0234567		OK

Refresh

Ambiguity Resolver

SOURCE RECORD

Nimble
Jack
12/31/1969
123 Main St.
Apt. 1
Nowhere
NV
048282
USA
0123456

LAST NAME

FIRST NAME

BIRTH DATE

GENDER

EMAIL ADDRESS

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

POSTAL CODE

COUNTRY

COLLEAGUE ID

TARGET RECORD

Possible Matches for PERSON

Click a record to show details. Or [manually enter an ID](#).

Combine Records

Do Not Combine

Match ID	Last Name	First Name	Messages
0123456	Nimble	John	Dupl. Rating: 45
0123356	Nimble	Jackie	Dupl. Rating: 55
0124456	Nimble	Paul	Dupl. Rating: 26

Ambiguity Resolver

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Duplicate Resolution

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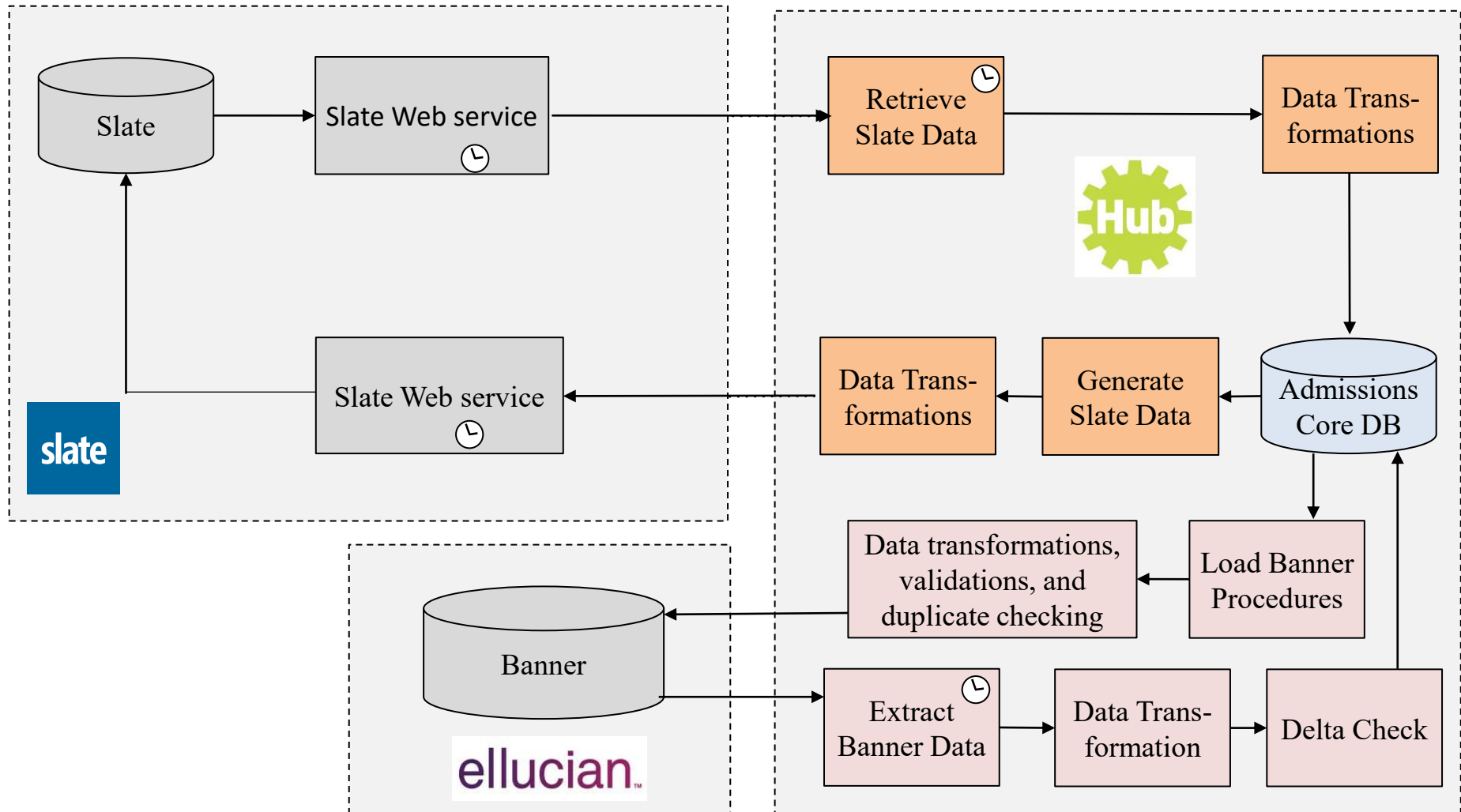
ENTER ID:

Submit

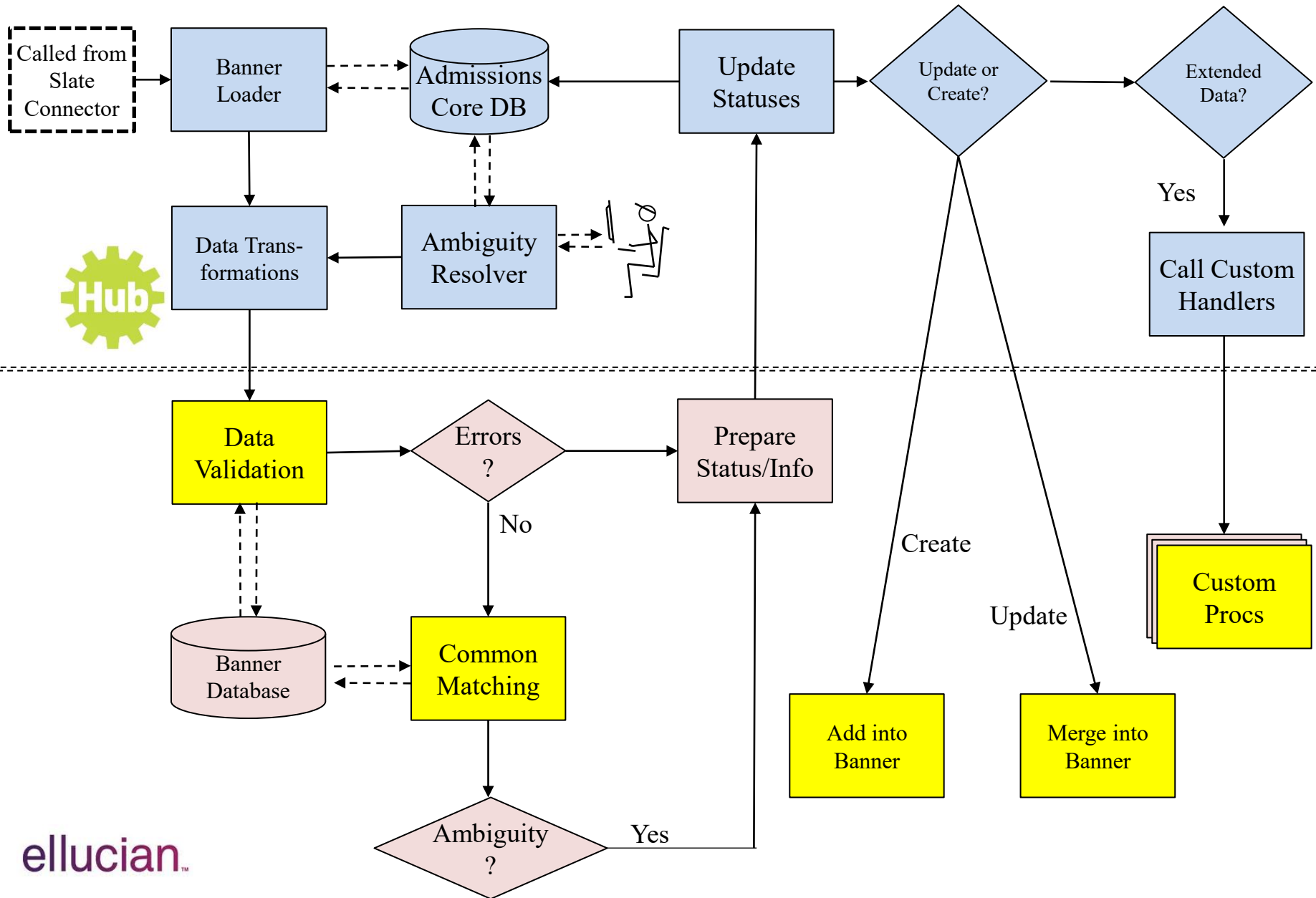
Match ID	Last Name	First Name
0123456	Singh	Balan
0123356	Singh	Balan
0124456	Singh	Balane
0125456	Sing	Blaine

Overview of Banner Data Flow

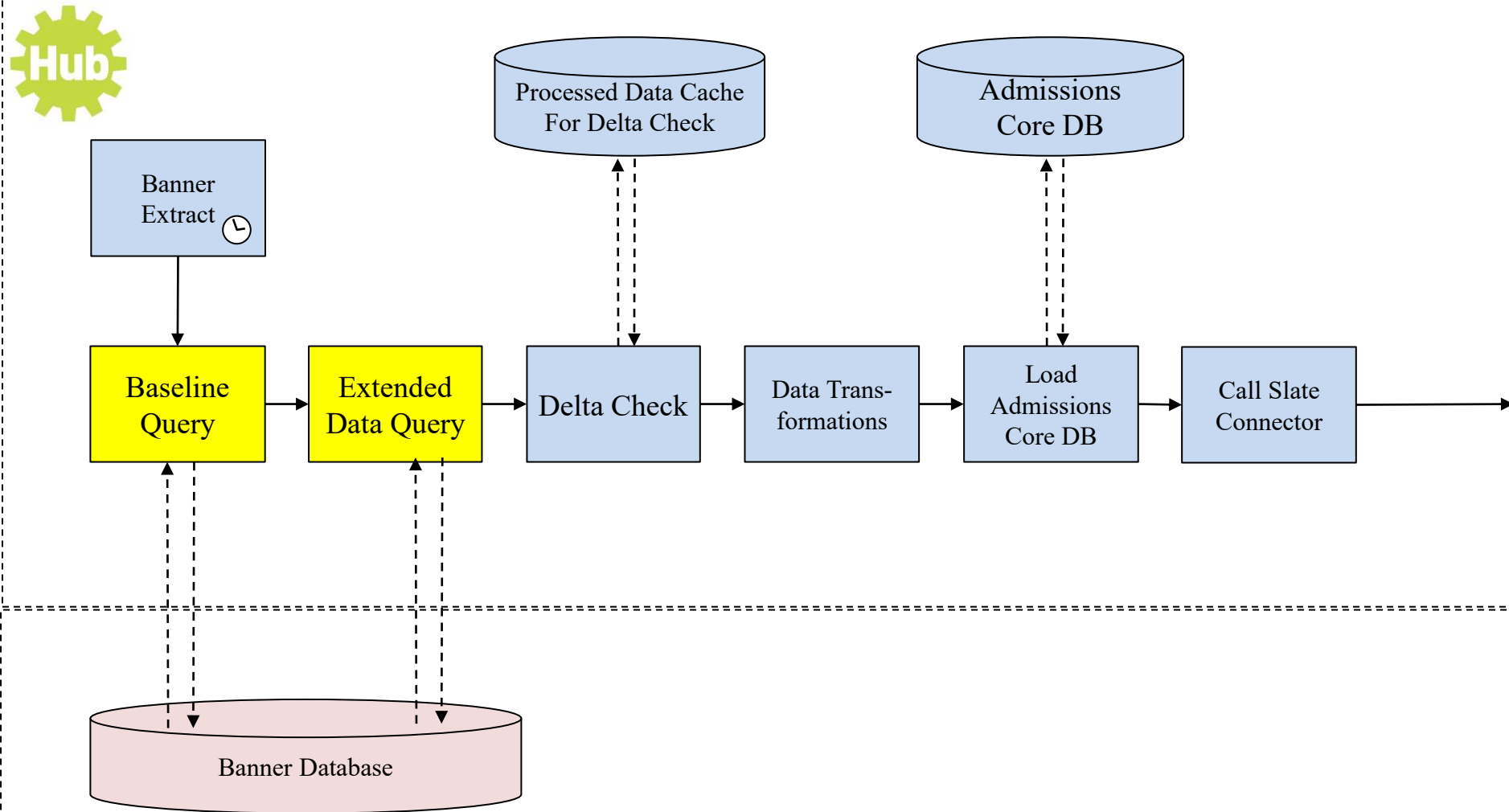
Slate-Banner Data Flow



IDataHub to Banner Dataflow

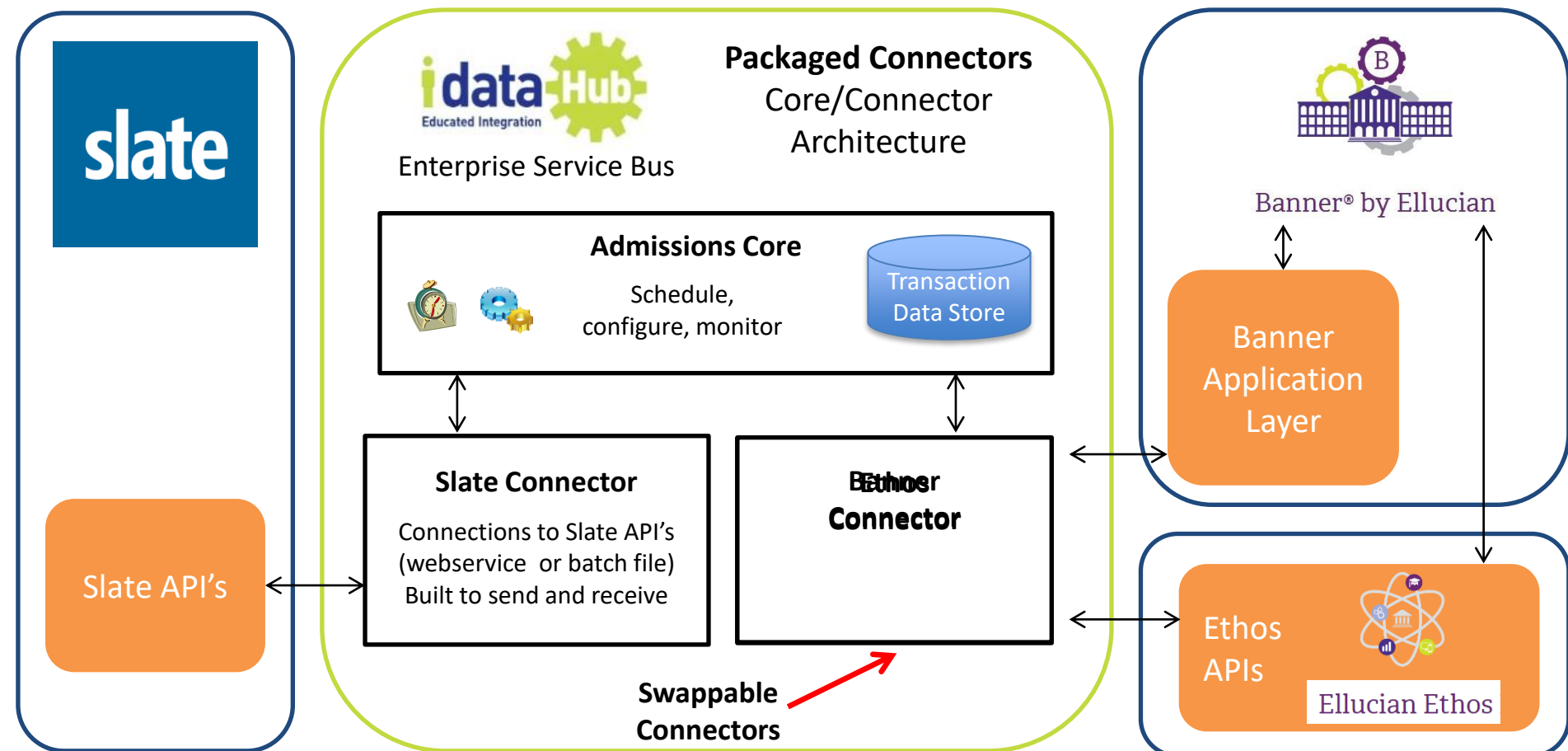


Banner to IDataHub Dataflow



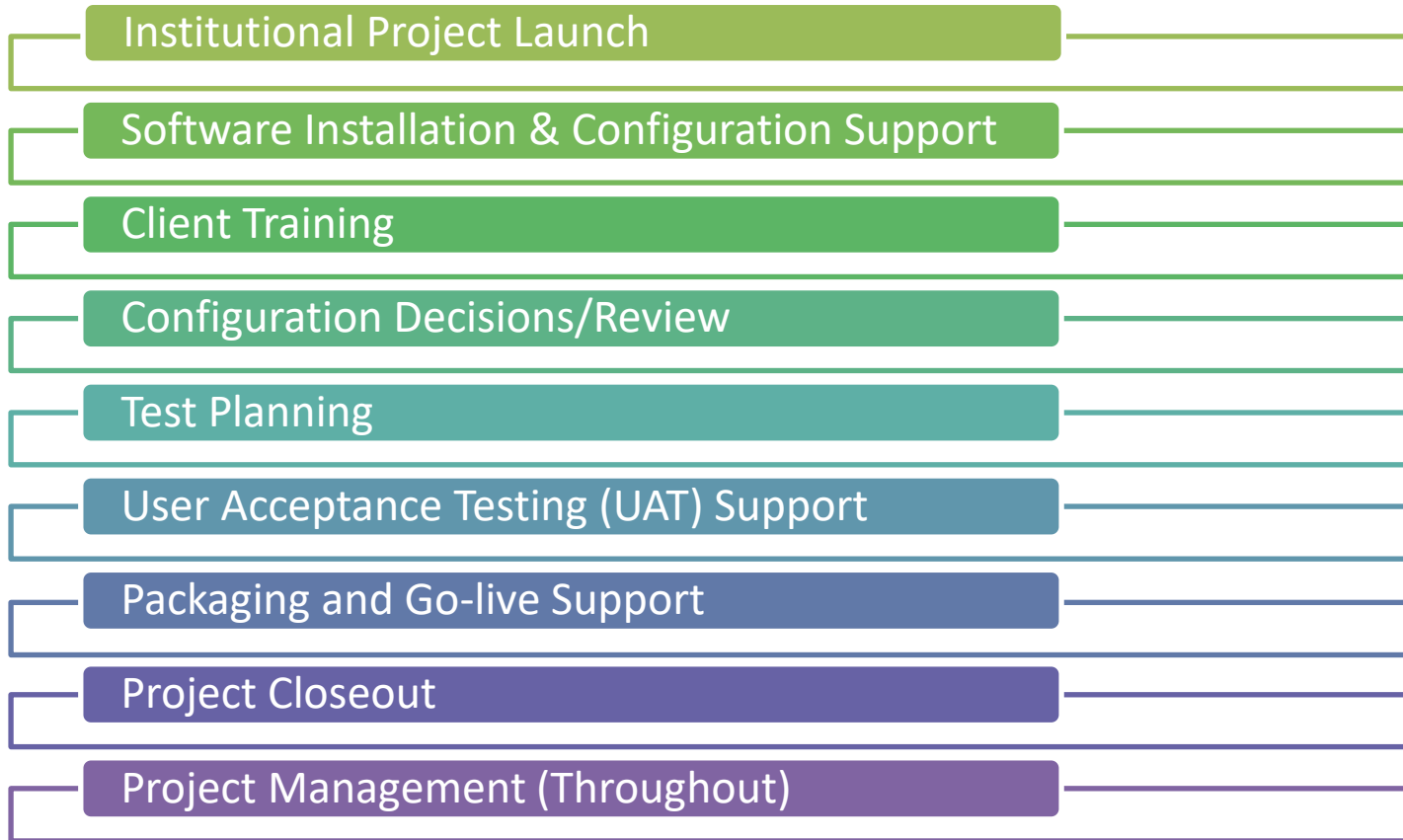
What About Ethos?

IDataHub Core/Connector Architecture

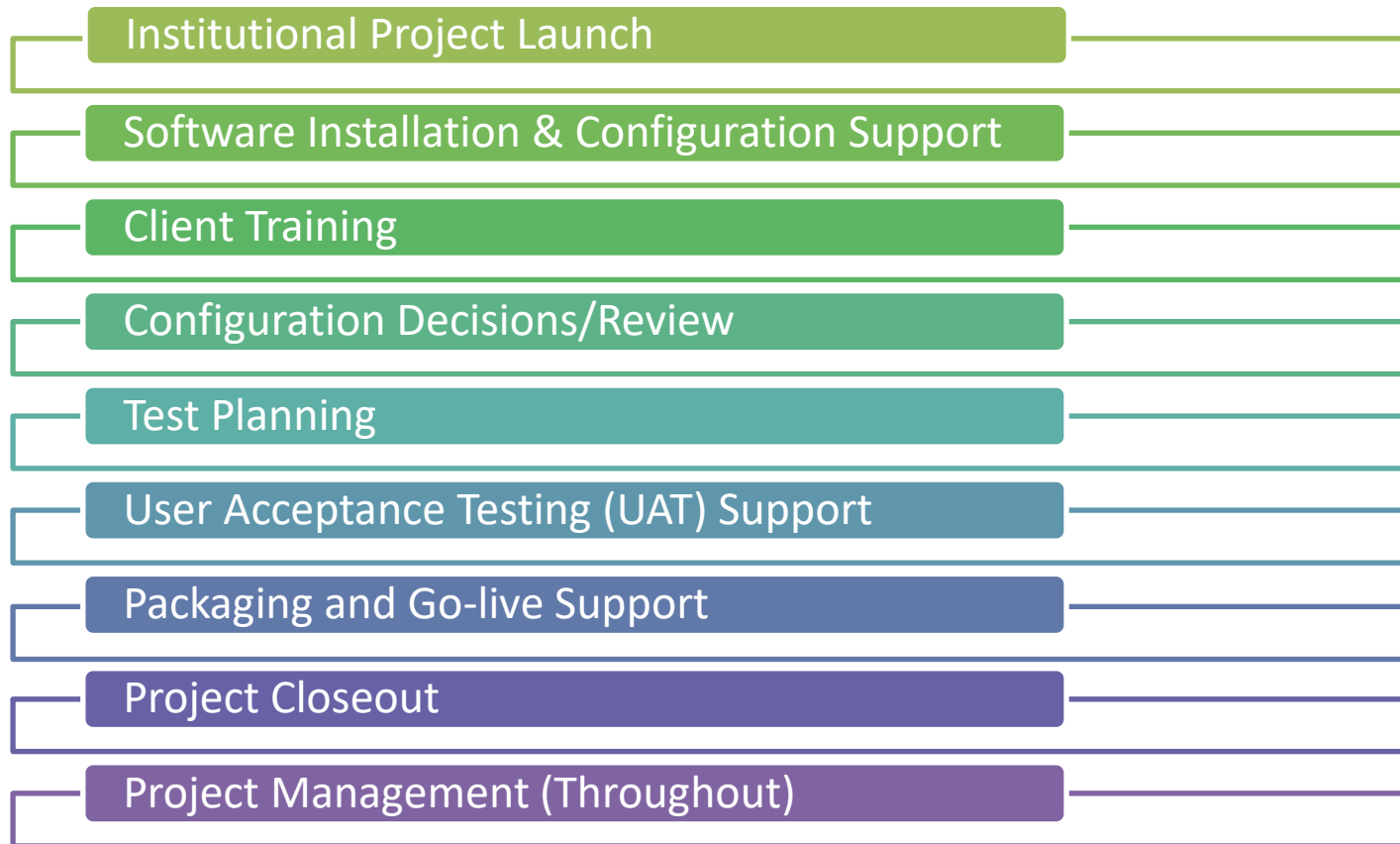


IT Implementation Roles & Responsibilities

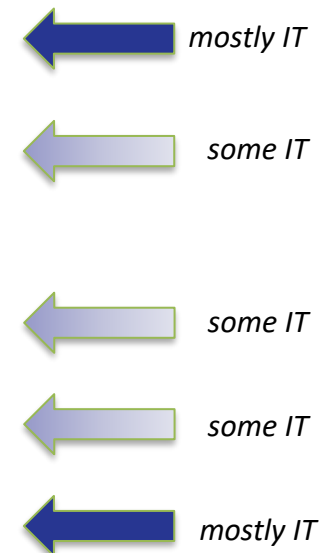
Implementation Process (Training & Support)



Implementation Process (Training & Support)



IT Involvement



Additional Resources & Next Steps

Thank You

Pricing

- go.idatainc.com/slate-connector-pricing

Server Requirements

- go.idatainc.com/slate (PDF download)

Additional Materials and online demo scheduling

- www.idatainc.com/products/hubbits/slate-connector/

Contact us by email:

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 - jcritchlow@idatainc.com
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