

IDataHub: Slate Connector Overview

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





Brian Parish

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



Jess Critchlow

- IDataHub Sales and Partnerships
- jcritchlow@idatainc.com



Sam Scruggs

- IData Director of Support
- sscruggs@idatainc.com



Agenda



- Introductions
- IData Background
- IData's Packaged Connector Approach
- Technical Overview
- Live IDataHub Demo
- Implementation Process Overview
- Questions & Next Steps



IData Background

THE INSTITUTIONAL DATA 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: 700+ Institutions

Partners: 30+ Vendors

















Clients – 700+ Institutions



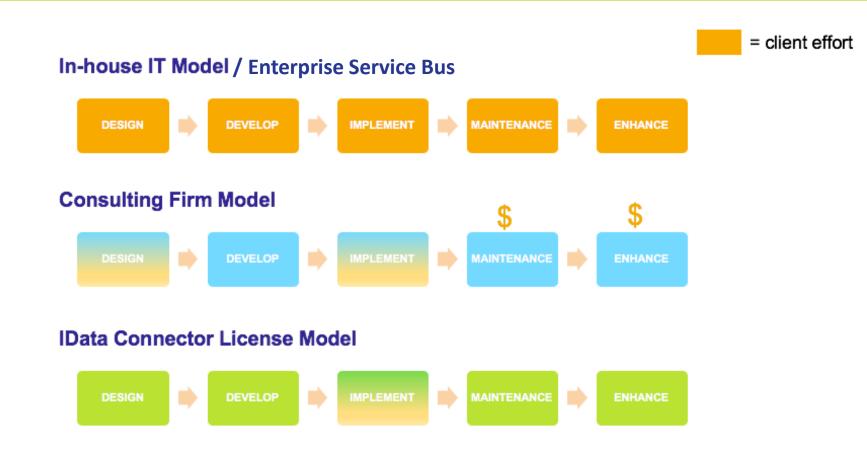




IData's Packaged Connectors

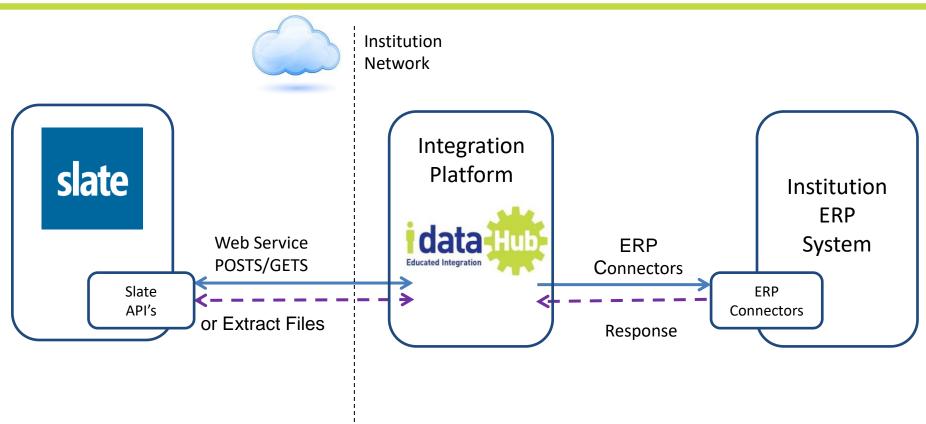
Integration Comparative Approach





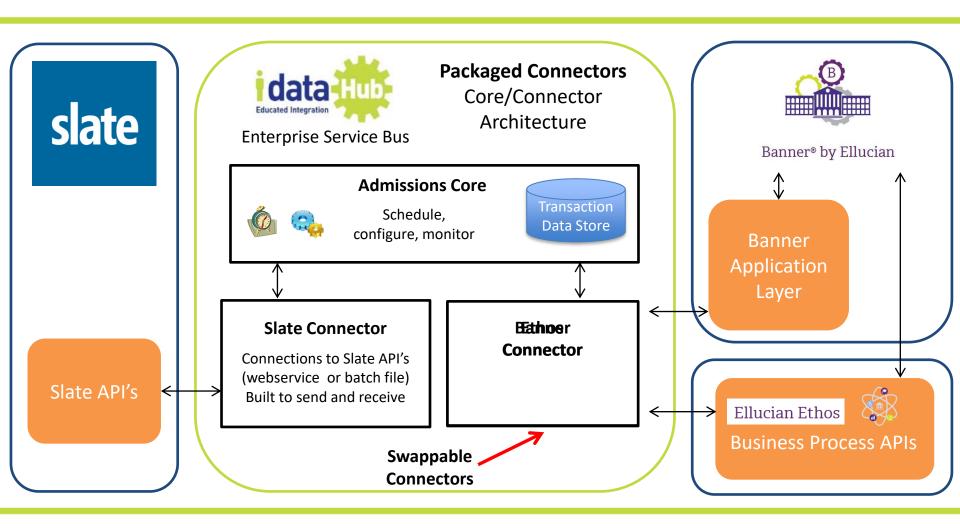


The IDataHub in a nut-shell





IDataHub Core/Connector Architecture







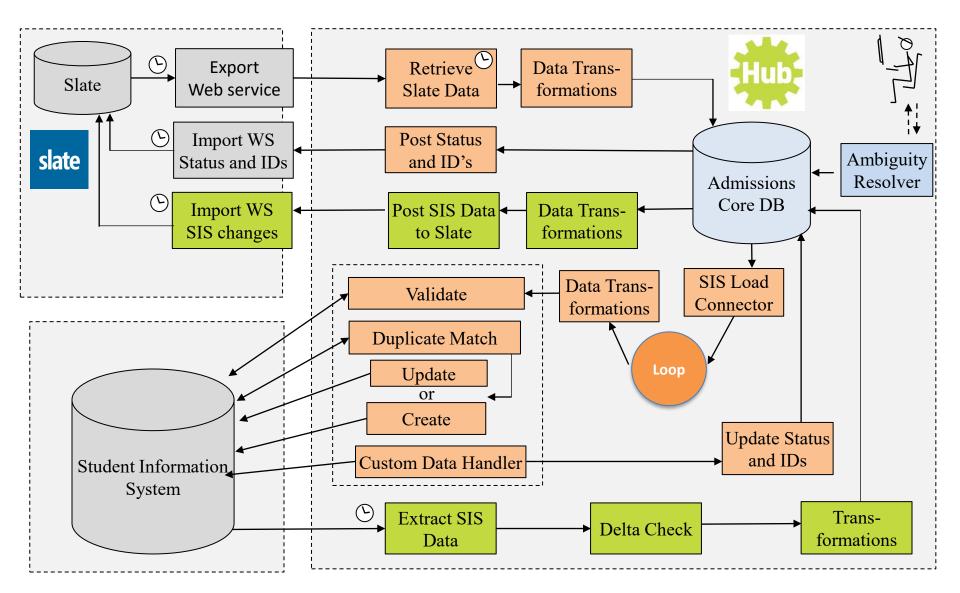
- Secure Bi-Directional Integration
- Fully Automated and scheduled
- Pre-packaged with robust data mappings
- Configurable Options, data translations, and logic hooks
- Data validation, error handling, notifications, and monitoring
- Built-in handling of extended (custom) data
- Supported and Maintained connectors



Integration Data Flow



Integration Data Flow



Slate Connection Methods



Applications

For each person, pull all relevant application information



Selects qualified records to move to the SIS & have new or change information in any of the objects since the last run. Pulls ID's and demographic data

Test Scores

For each person, pull all relevant test score information



Schools

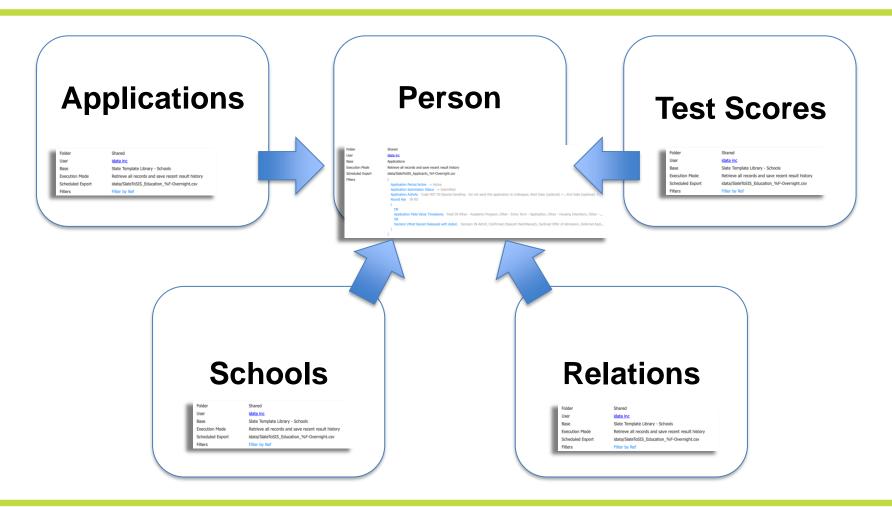
For each person, pull all relevant prior institution information



For each person, pull all relevant relation information

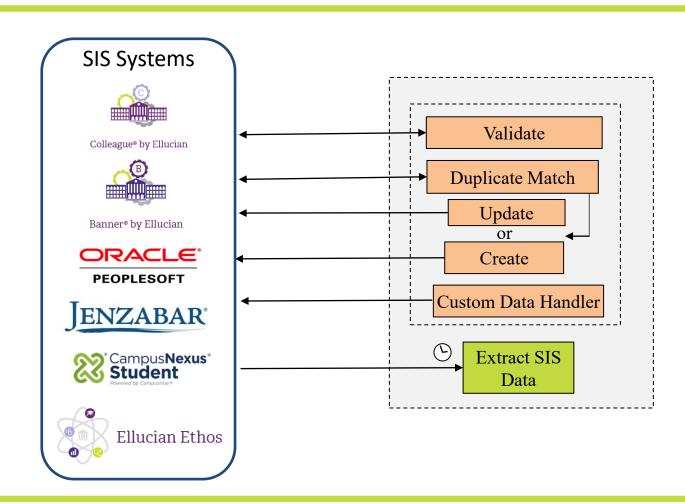


Multi Query Web Services



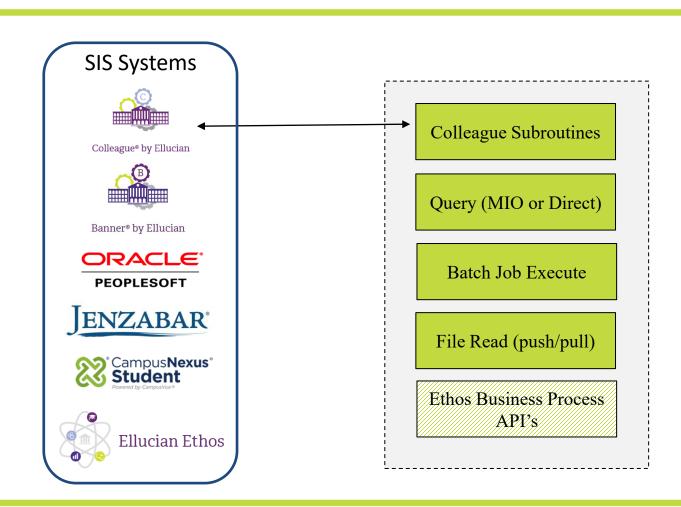






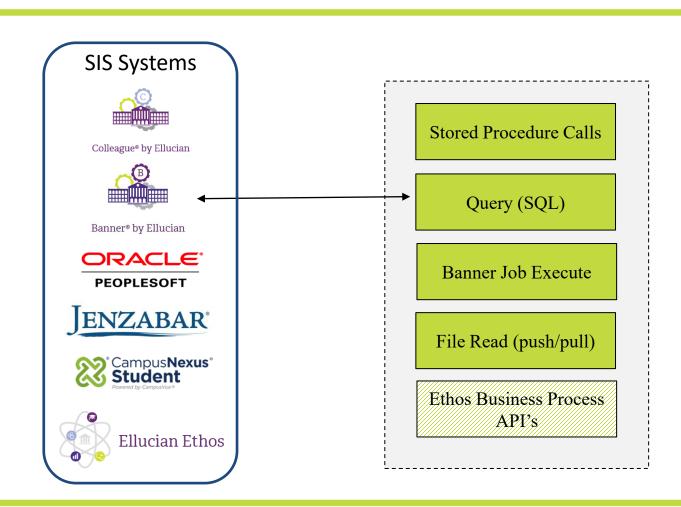






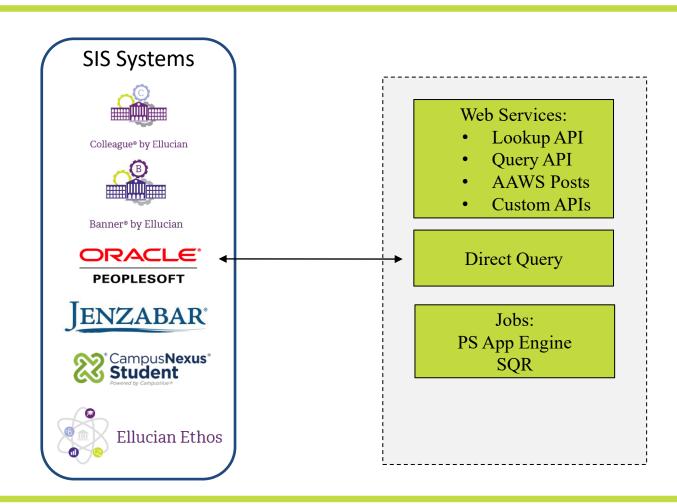






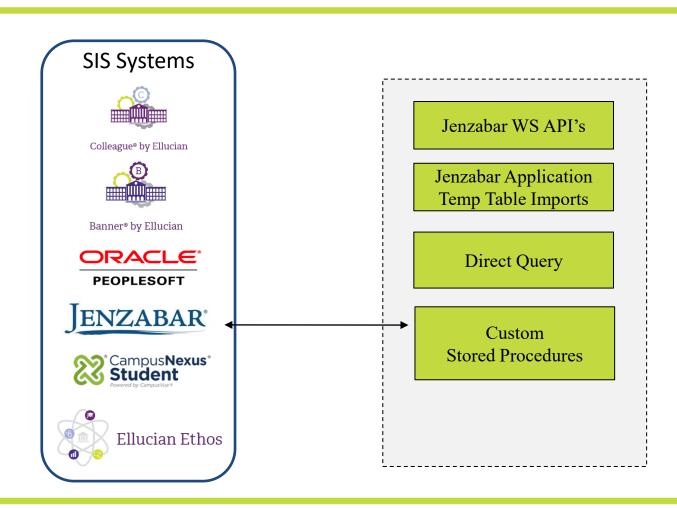






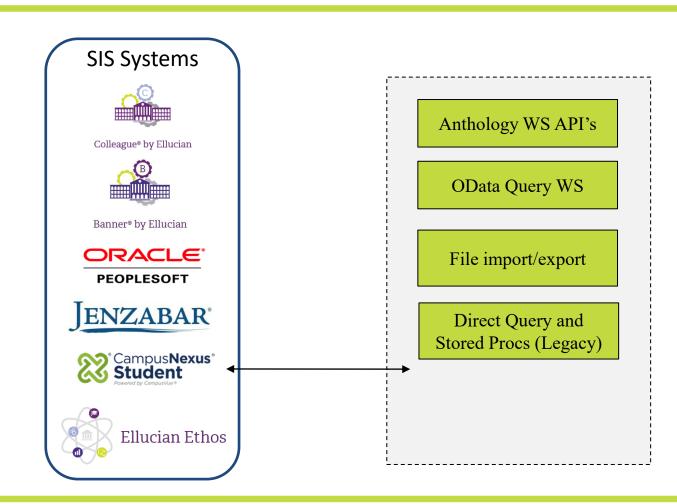




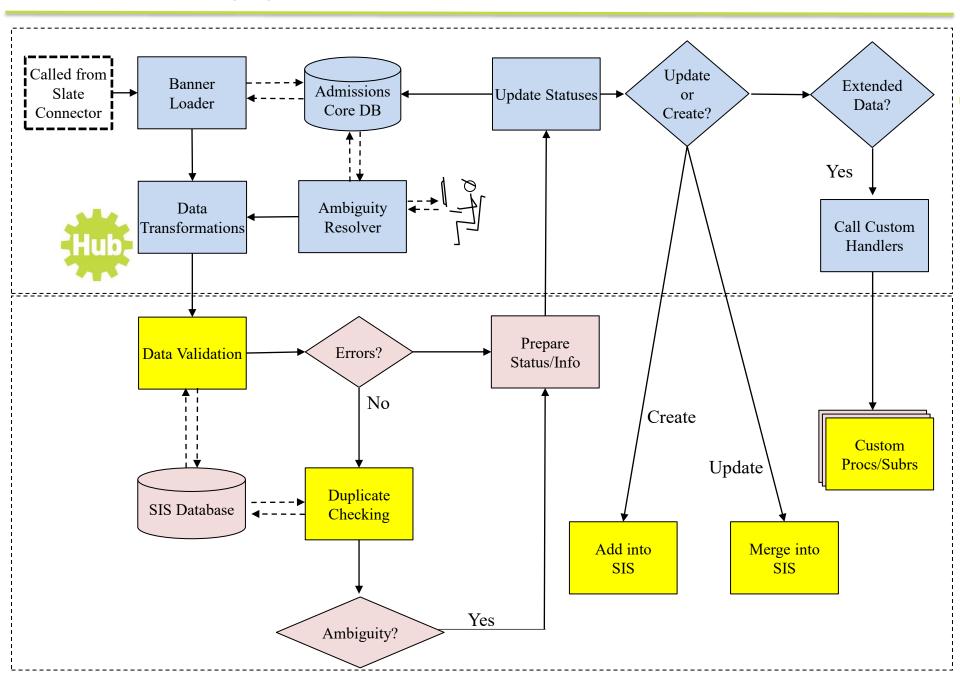




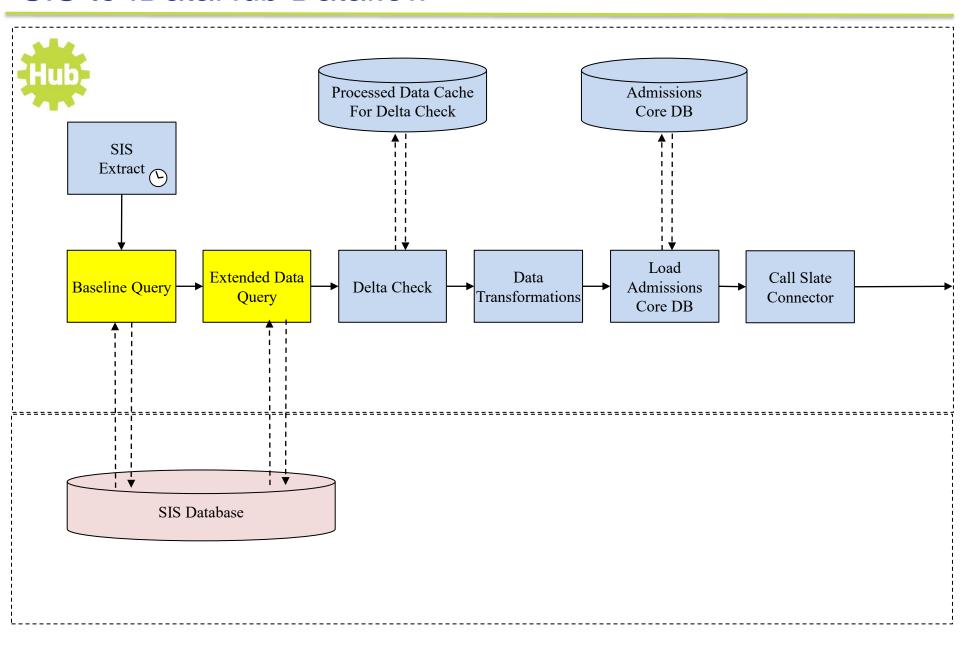




IDataHub to SIS Dataflow

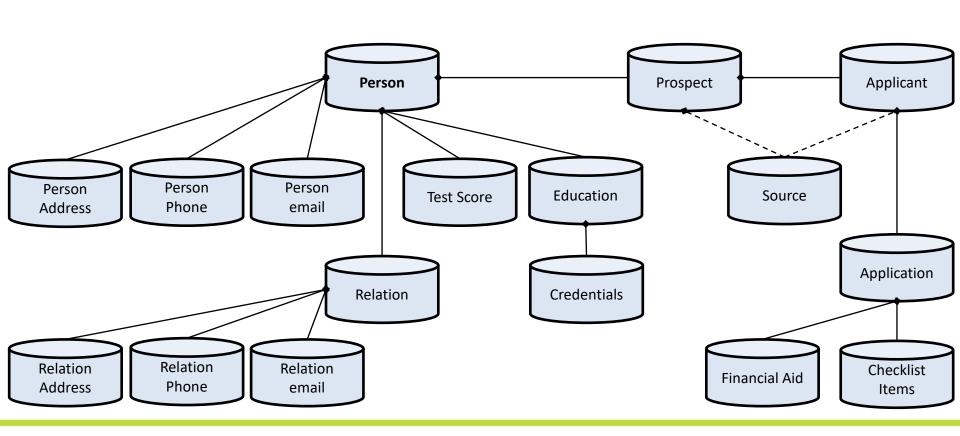


SIS to IDataHub Dataflow





Admissions Core Objects





Live Look Into The IDataHub



New – Michael Goetje
New record in Slate
Not yet sent to SIS

No Records Exists

New Applicant Created
New records created in SIS

Update - Karen LarabentNew Address:
"37 Maple Street"

Karen Larabent
Exists in SIS with current address:
"235 Maple Street"

Updated Address
Inactivate old mailing address
New current mailing address

3 Ambiguity - James W. Tatum Jr New record in Slate Not yet sent to SIS JWT Jr does not exist BUT
James Wingo Tatum Sr exists
with the same address but a
different Date of Birth

Common Matching Ambiguity
Data not loaded based on
reported ambiguity.

Validation Error - Louisa Vasco
New record in Slate.
Not yet sent to SIS
No Date of Birth included in the data.

No Records Exists

No Record Loaded for Louisa



Connector Implementation Process





Institutional Project Launch	IT Involvement
Software Installation & Configuration Support	
Client Training ——————————————————————————————————	mostly IT
Configuration Decisions/Review	
Test Planning	some IT
User Acceptance Testing (UAT) Support	some IT
Packaging and Go-live Support	mostly IT
Project Closeout	
Project Management (Throughout)	



Questions

Featured Connectors













Hyland



Next Steps



To Set Up A Call for Further Discussions

Jess Critchlow

- IDataHub Sales and Partnerships
- jcritchlow@idatainc.com

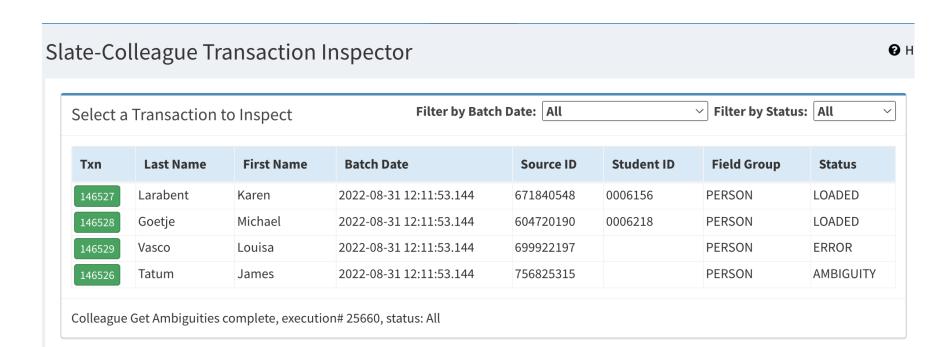




Additional Material

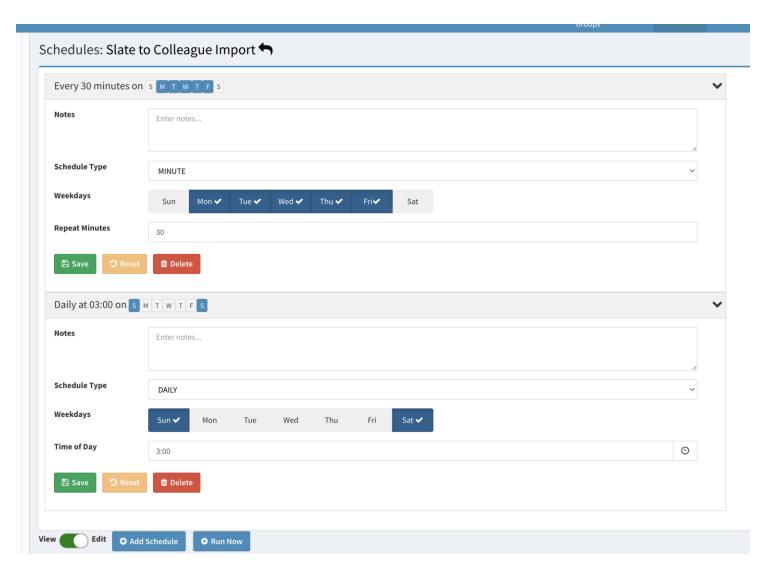


Duplicate Resolution





Run Now or Scheduling



IDataHub Configurations



Mapping Options

Field Mapping Overrides

CRM Fields 📵

Source Object 1

CRM-Core Fields ①

0

Custom Fields •

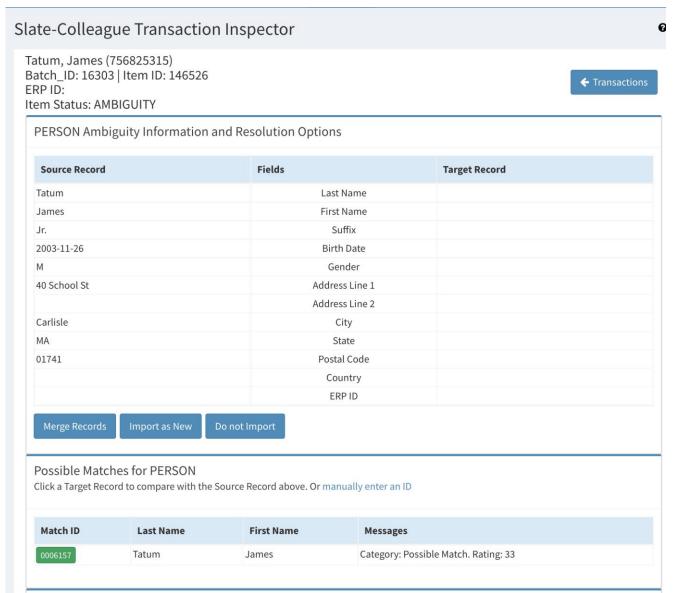
	Custom Field Names 1	Custom Field Object 🕦	Custom Field Tables 🗷 🕦		
1	CRM Person ID Type	Person	ADM_PERSON		
2	Hair Color	Person	ADM_PERSON		
3	Preferred Email Indicator	Person Email	ADM_EMAIL		

Default Field Values •

	Pre-defined Field Names 🕦	Pre-defined Field Values 🐧
1	CRM Person ID Type	LEG
2	Email Address Type	PRI
3	Home Phone Type	НО
4	Mobile Phone Type	НО



Duplicate Resolution



Slate-Colleague Transaction Inspector

Tatum, James (756825315)

Batch_ID: 16303 | Item ID: 146526

ERP ID:

Item Status: AMBIGUITY



PERSON Ambiguity Information and Resolution Options

Source Record	Fields	Target Record	
Tatum	Last Name	Tatum	
James	First Name	James	
Jr.	Suffix	Sr.	
2003-11-26	Birth Date	1978-02-17	
M	Gender	M	
40 School St	Address Line 1	40 School St	
	Address Line 2		
Carlisle	City	Carlisle	
MA	State	MA	
01741	Postal Code	01741	
	Country		
	ERP ID	0006157	

Merge Records

Import as New

Do not Import

Possible Matches for PERSON

Click a Target Record to compare with the Source Record above. Or manually enter an ID

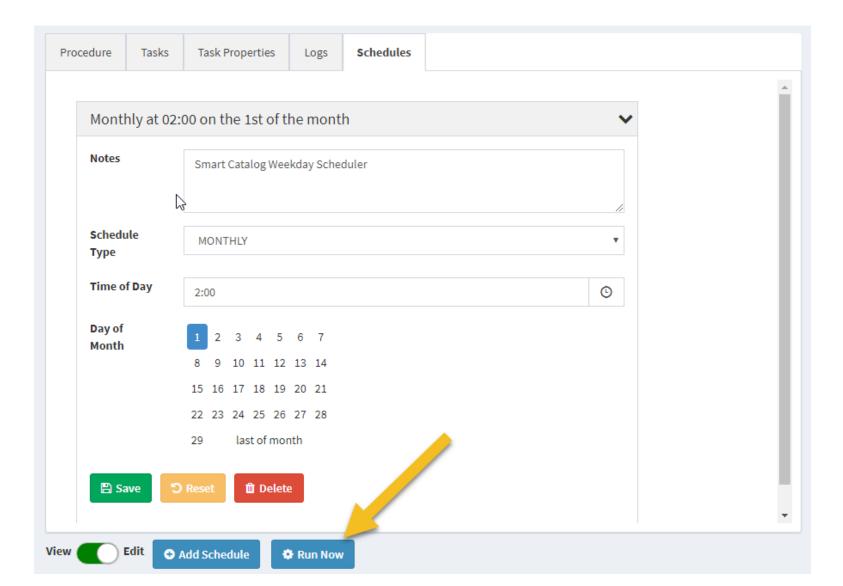
Match ID	Last Name	First Name	Messages
0006157	Tatum	James	Category: Possible Match. Rating: 33



A Look Inside The IDataHub



Run Now or Scheduling





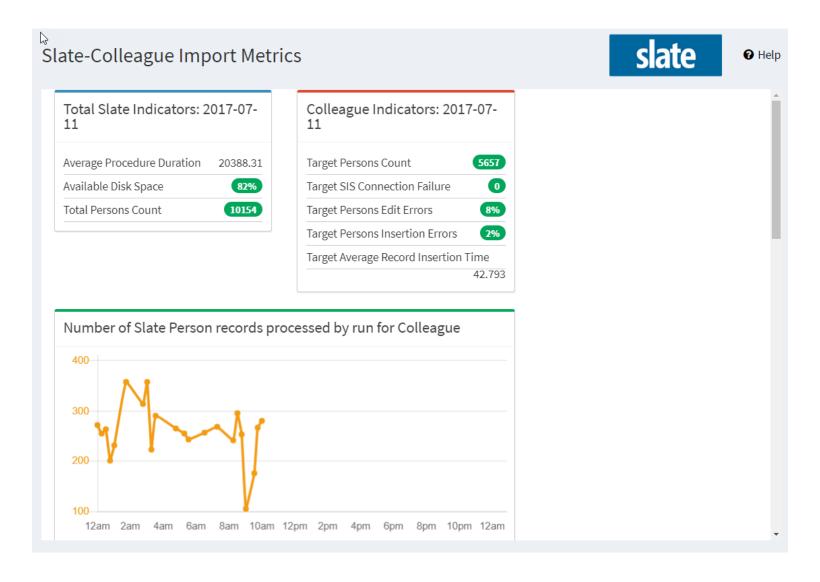
IDataHub Procedures and Automation



Every 15 minutes on	SMTW	/ T F S							~
Notes	Enter not	tes							
Schedule Type	MINUTE								<i>A</i> ▼
Weekdays	Sun 🗸	Mon 🗸	Tue 🗸	Wed ✓	Thu 🗸	Fri✔	Sat ✓		
Repeat Minutes	15							G.	
Save S Reset	Î Dele	te							

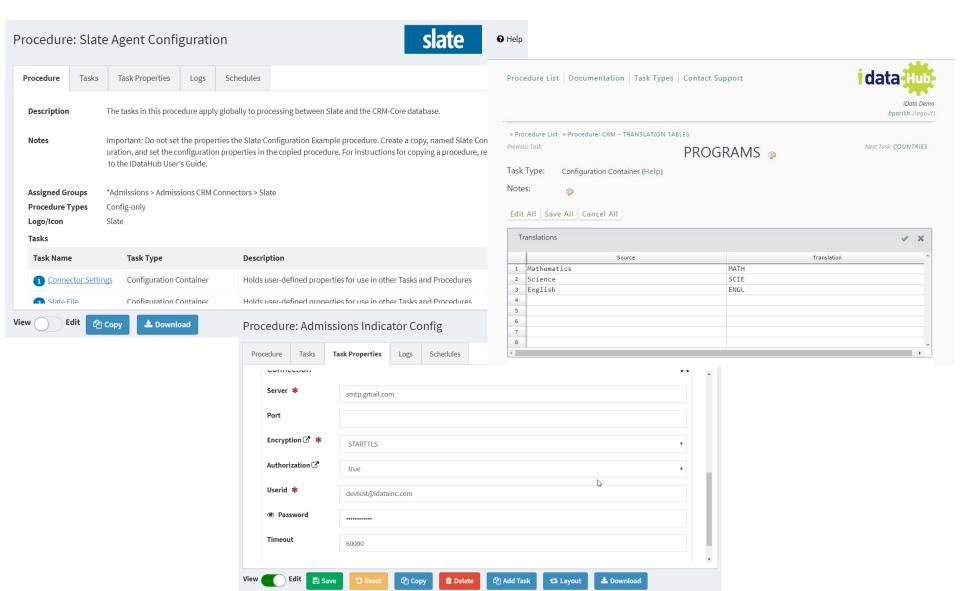


Transaction Monitoring & Metrics





Configurations, Translations, and Routing



Duplicate Resolution



Procedure List | Documentation | Task Types | Users | Contact Support

My Forms: Transaction Inspector



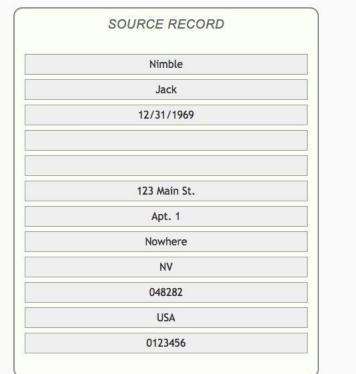
Transaction Inspector

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		ОК

Refresh

Ambiguity Resolver





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



LAST NAME

FIRST NAME

BIRTH DATE

GENDER

EMAIL ADDRESS

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

POSTAL CODE

COUNTRY

COLLEAGUE ID

TARGET RECORD Nimble John 12/31/1969 123 Main St. Nowhere NV 048282 USA 0123456

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	





Possible Matches for PERSON

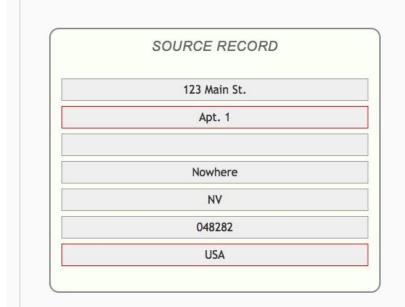
Click a record to show details. Or manually enter an ID.

ENTER ID:

Submit

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

Ambiguity Resolver



ADDRESS LINE 1

ADDRESS LINE 2

ADDRESS LINE 3

CITY

STATE

POSTAL CODE

COUNTRY

Nowhere NV 048282

Possible Matches for ADDRESS

Click a record to show details. Or manually enter an ID.

Combine Records Do Not Combine

Match ID	Address Line 1	City	State
43423	123 Main St.	Nowhere	NV
42859	123 End St.	Nowhere	NV
29384	123 Frank St.	Nowhere	NV
2934	123 Dole St.	Nowhere	NV



Admissions Core Fields



Base Data

Veteran Status

•	Last Name	•	IPEDS Hispanic/Latino	•	State
•	Social Security Number	•	Ethnicity	•	Postal Code
•	SIS Person ID	•	List of Races	•	County
•	List of alternate PERSON IDs	•	List of Races	•	Country
•	CRM Person ID	•	Languages Spoken	•	Preferred Residence
•	List of alternate ID types	•	Primary Language		Indicator
•	CRM Person ID Type	•	Alien Status	•	Preferred Mailing Address
•	First Name	•	Country of Citizenship		Indicator
•	Middle Name	•	Country of Residence	•	Address Start Date
•	Preferred Name	•	Alien Registration Number	•	Address End Date
•	Prefix	•	Immigration Status	•	Phone Number
•	Suffix	•	Visa Type	•	Phone Type
•	Gender	•	Person Origination Code	•	Phone extension
•	Date of Birth	•	Person Origination Date	•	Email Address
•	Former First Name	•	Person Source Code	•	Email Address Type
•	Former Last Name	•	Address Type	•	Preferred Email Indicator
•	Place of Birth	•	Address Line 1	•	Event Attended
•	Marital Status	•	Address Line 2	•	Event Attended Date
•	Religious Preference	•	Address Line 3	•	Highly Desirable
•	Veteran Status	•	City	•	Prospect Comments

City



Base Data (Continued)

Base Data (Continued)



- Degree Sought
- Application Comments
- Influenced to Apply
- Full Time/Part Time Intent
- Student Type
- Application Fee Receipt Indicator
- Application Fee Receipt Date
- Institution Attended ID
- Institution Attended CEEB Code
- Institution Attended FICE Code
- Institution Attended Name
- Institution Attended Address
 Line 1
- Institution Attended Address Line 2
- Institution Attended Address
 Line 3
- Institution Attended City
- Institution Attended State

- Institution Attended Postal Code
- Institution Attended Country
- Institution Attended Type
- Institution Attended Start Date
- Institution Attended End Date
- Institution Attended Start Years
- Institution Attended End Years
- Institution Attended Transcript Date
- Institution Attended Transcript Type
- Institution Attended Transcript Status
- Institution Attended Credits Earned
- Institution Attended GPA

- Institution Attended Class Rank Percentage
- Institution Attended Class Rank Numerator
- Institution Attended Class Rank Denominator
- Institution Attended Graduation
 Type
- Type of Education
- Institution Attended Diploma Received
- Credential Institution ID
- Institution Attended Degree Obtained
- Institution Attended Degree Date
- Institution Attended Certificates
 Obtained
- Institution Attended Certificate Dates
- Institution Attended Major
- Institution Attended Minor

Base Data (Continued)



- Institution Attended Specialization
- Test Name
- Test Start Date
- Test Date
- Test Score
- Test Status
- Test Source
- Relation Person ID
- Type of relationship
- Relation Prefix
- Relation Suffix
- Relation First Name
- Relation Last Name
- Relation Gender
- Relation Living/Deceased
- Relation Source Code
- Relation Address Type

- Relation Address Line 1
- Relation Address Line 2
- Relation Address Line 3
- Relation Address City
- Relation Address State
- Relation Address Postal Code
- Relation Address Country
- Relation Email Address
- Relation Email Address Type
- Relation Phone Numbers
- Relation Phone Types
- Relation Phone Extensions



Advantages of Multi-Query Web Services

- Data is more accurate and comprehensive
- Queries are streamlined
- Data is readable and easy to troubleshoot
- Fast, on-demand data extracts and loads
- Flexibility to leverage more powerful data controls







New – Michael Gotje Slate ID 604720190

Record in Slate, fulfills all integration requirements for trip to Colleague. (No SIS ID)

No Records Exists

No Applicant, Person, or Application for Michael Gotje

New Applicant Created
New records created in
Colleague for Michael Gotje

Update - Karen Larabent

Existing Record in Slate, already sent to Colleague (SIS ID 0006156 in Slate). Updated mailing address in Slate to "37 Maple Street" Karen Larabent

Exists in Colleague with Colleague ID 0006156. Current mailing address in Colleague is "235 Maple Street" **Updated Address**

Inactivate old mailing address New current mailing address added to Colleague: 37 Maple Street

3 Ambiguity - James W. Tatum Jr
New Record in Slate, fulfills all
integration requirements for trip
to Colleague. Not sent to
Colleague yet (No SIS ID)

James Wingo Tatum Sr exists

with the same address but a different Date of Birth

Common Matching Ambiguity

Data not loaded based on reported ambiguity. Can be loaded or updated based on manual resolution.

Validation Error - Louisa Vasco

New record in Slate. No Date of Birth included in the data. **No Records Exists**

Louisa Vasco does not exist in Colleague.

No Record Loaded for Louisa

Inbound validation catches error, logs error, does not load to Colleague, creates error message for review.