Workflow Wednesday
Definition Approval Workflow

Workflow Wednesday Series

January 31 - Basics

February 28 - Definitions

March 28 - Specifications

Logistics

- 1st half of session is presentation and will be recorded
- 2nd half of session is discussion and will not be recorded
- You will receive the link to the recording tomorrow
- If question or comment put in the chat / question box

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Recorded Data Governance Webinars

http://www.idatainc.com/recorded-webinars/

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Upcoming Webinars

Pragmatic Data Governance Series

#1 Just in Time Data Governance (6/22/17)
To View

#2 Data Governance on a Dime (6/8/17)
To View

#3 Clear Path from Question to Answer (3/16/17)

Recent Posts

› Quick Summary of What is Data Governance and Key Best Practices

› Higher Education Data Governance Related Webinars for November

› Webinar Schedule for Data Governance Series Announced
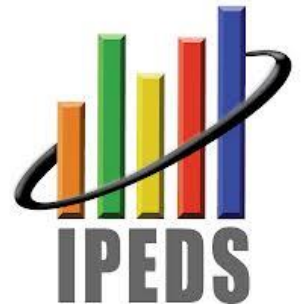
Upcoming webinars at: http://www.idatainc.com/about-us/idata-webinars/

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community.datacookbook.com

- Open to everyone

- Content from regulatory agencies and other institutions.

- Data definitions, Specifications, Contact information, Documentation

Watch for your community forum news emails

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  - ➢Providing a testimonial quote
  - ➢Being a Data Cookbook reference
  - ➢Having a case study done about your institution
  - ➢Writing a blog post
  - ➢Co-presenting at a conference or on a webinar
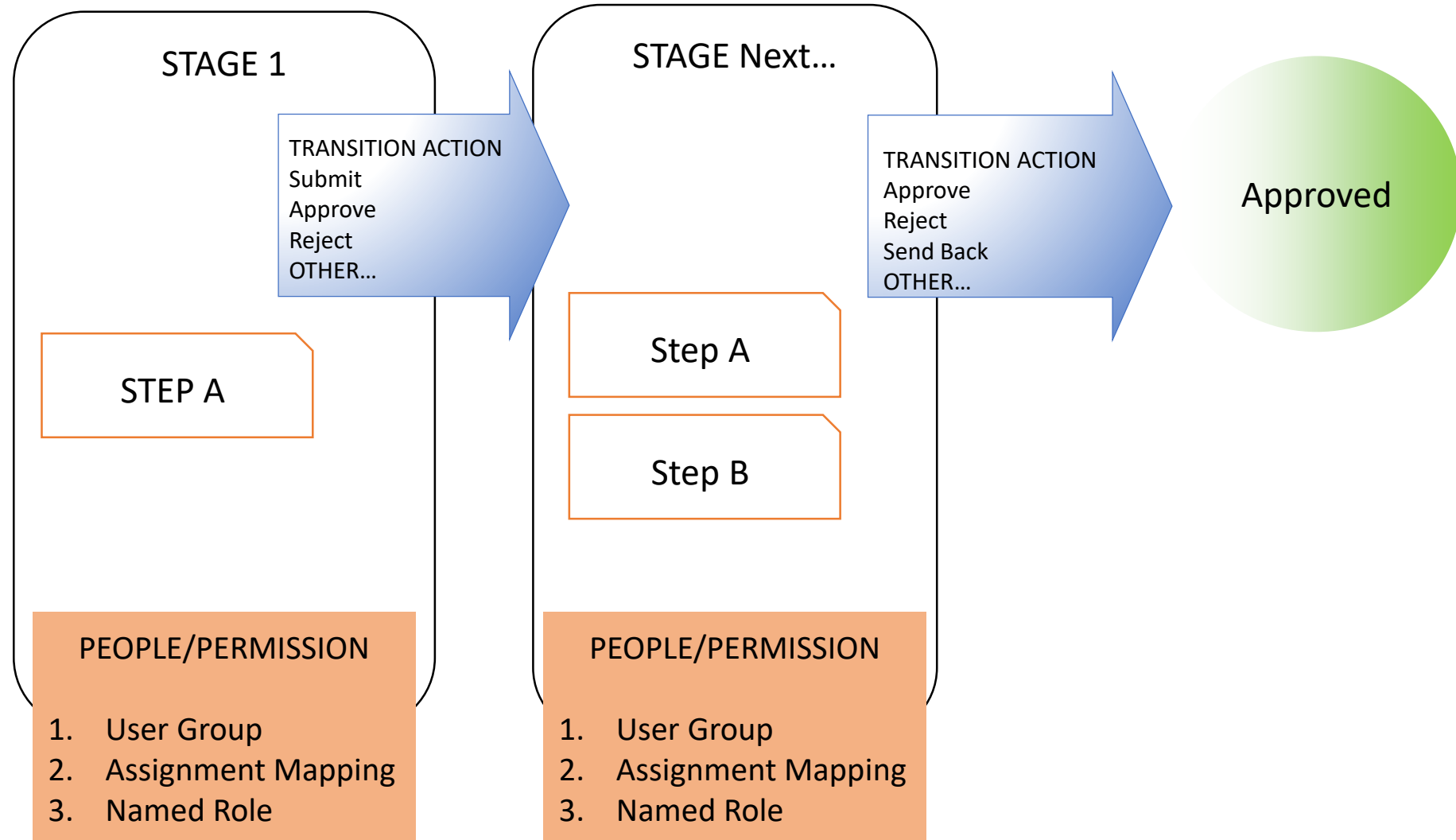- Send email to marketing@idatainc.com if interested

Agenda

- Quick Anatomy review
- 4 Samples
- Advanced Features Summary
- Versions
- Migrating definitions to new version or new workflow

Anatomy

- Stages
- Steps
- Transition Actions
- Add people
  - User group
  - Assignment Map
  - Named Role
- Conditional

STAGE 1

TRANSITION ACTION
Submit
Approve
Reject
OTHER…

STEP A

PEOPLE/PERMISSION

1. User Group
2. Assignment Mapping
3. Named Role

STAGE Next…

Step A

Step B

TRANSITION ACTION
Approve
Reject
Send Back
OTHER…

PEOPLE/PERMISSION

1. User Group
2. Assignment Mapping
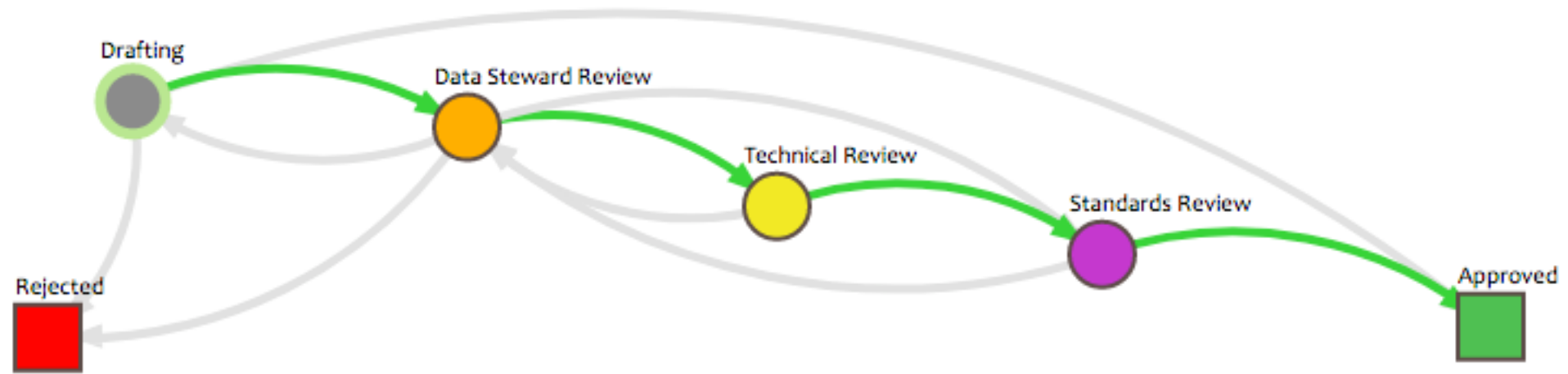3. Named Role

Approved

Illustrate

- Primary/Conditional workflow selection
- Approve Entry Point
- View labels in workflow panel

4 Examples

1. Primary workflow
2. Primary workflow combined with HR Conditional workflow
3. Vote
4. Functional Team Editing
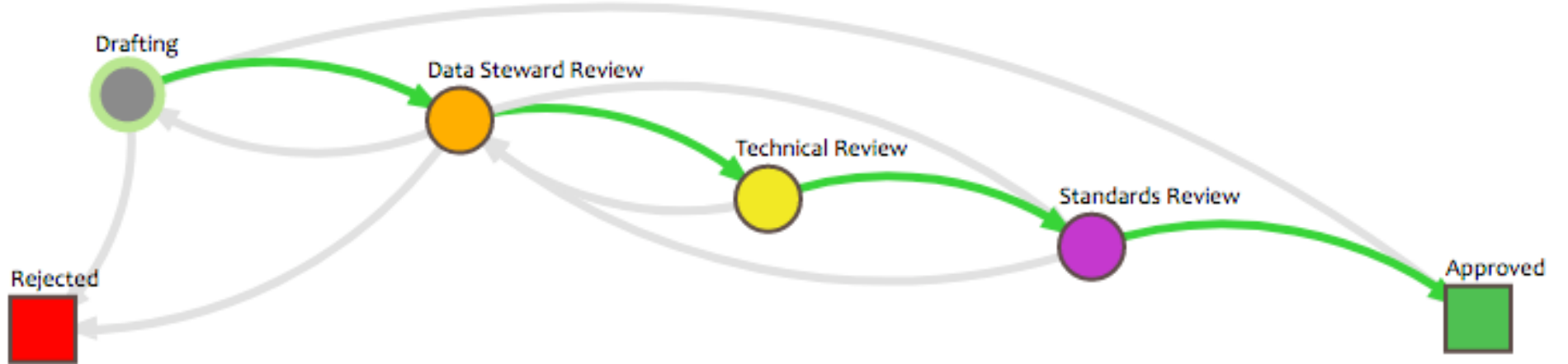
Primary

Tricky parts

- Accommodate multiple Functional Areas (Assignment mapping)
- Must enter Technical definition prior to Technical Review or Leap Frog alternative path
- Populate Assignment Mappings with General user groups
- Multiple steps per Stage
- Courtesy Entry Point for Approval by data steward at Drafting
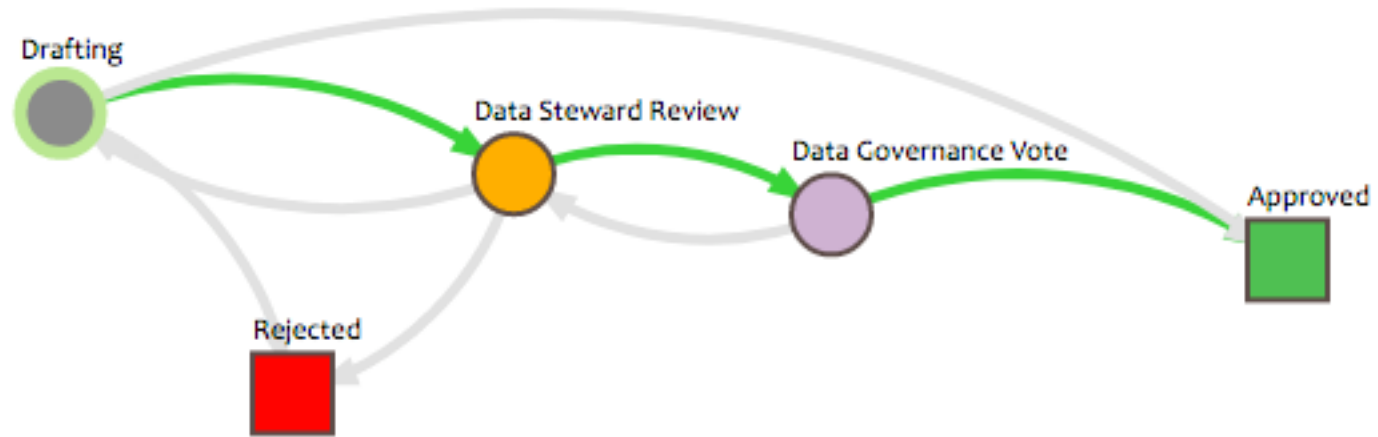
Primary and Conditional Bundle
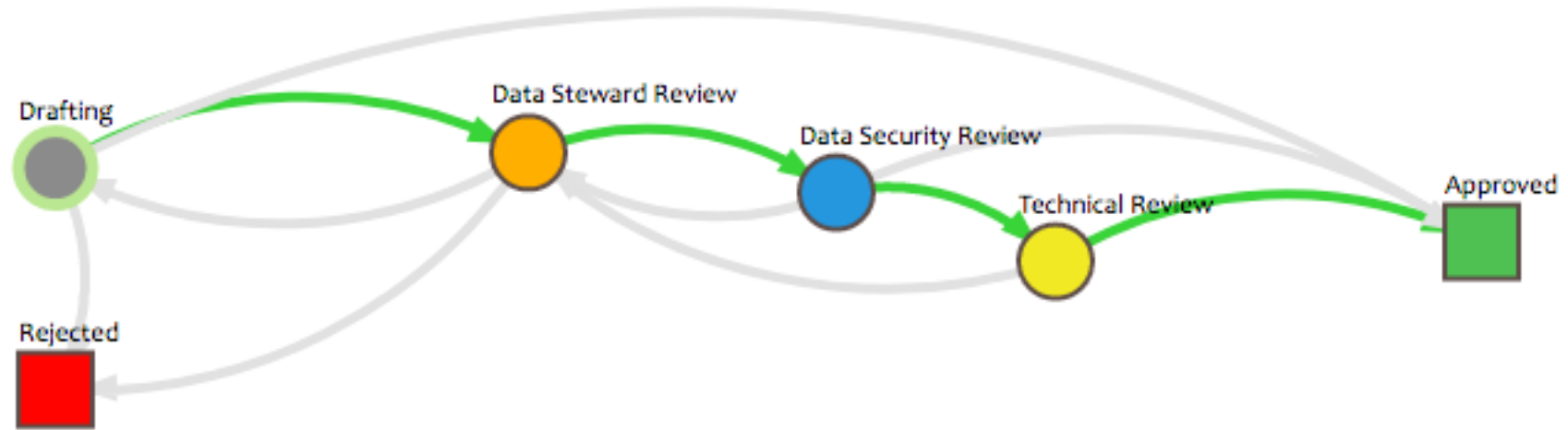
Tricky parts – Primary and Conditional Bundle

- HR workflow
  - Conditional on a workflow
  - Accommodate multiple Functional Areas (HR and xyz) (Assignment mapping)
- Both workflows
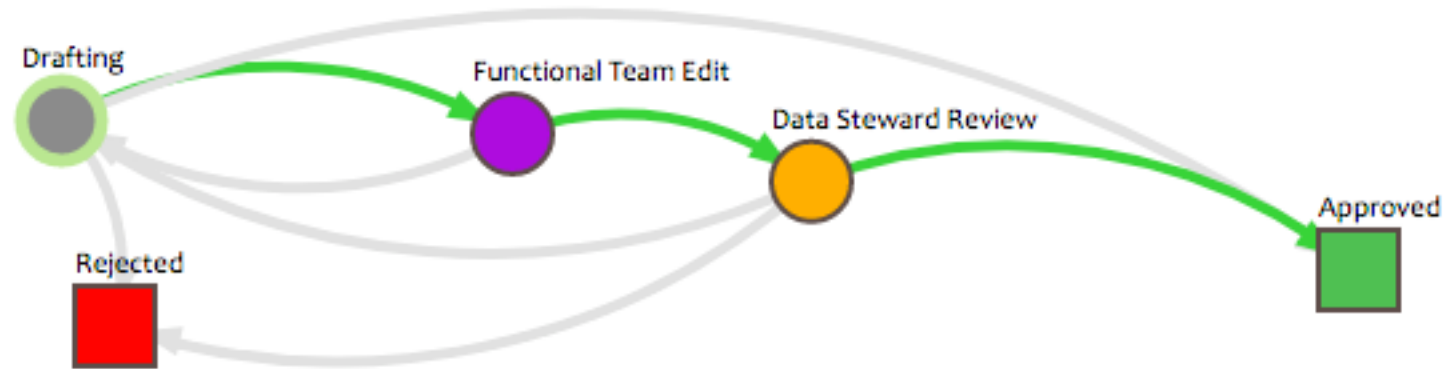 - Order on workflow display page

Vote

Tricky parts - Vote

- Data Governance Stage
  - All
  - No timeout
  - Override in Approve transition action
  - Not allowed to Edit or Collaborate

Functional Team Edits

Tricky Parts – Functional Team Editing

- Assignment Mapping – Editors by Functional Area
  - Use of "General Editors" group in Mapping
- Required | All
- 3 Day Timeout balances the Required | All

Advanced Features

- Alternate Paths
  - Send back | Leap frog
  - Override
- Entry Point (jump to later stage from Create a Definition)
- Multiple steps per Stage
- Conditional
  - Functional Area
  - Data System
  - Classification Code

Migrating to a new workflow

- Definitions stay within the workflow in use when Definition was created
- 2 methods to migrate
    1. Prior to installing the new workflow, approve all definitions in the current workflow, then Version the definitions that need the new workflow.
    2. Export all definitions, then delete them. Install the new workflow, then import definitions.
- Not required to migrate – do nothing
    - Confusion in both directions
        - Content "falsely" approved
        - Staff using 2 workflows simultaneously

Versions

- Tasks that force a new version
    - New Stage
    - New Step
    - Change All/Any within a Step
    - Change Entry Point or Override within a Transition Action
    - Conditional
- Tasks that do NOT force a new version
    - Change labels or descriptions
    - Check/Uncheck Required
    - Create new Transition Actions or edit existing
    - Swap User Groups, Assignment Mapping, or Named Role
    - Change users within user groups

Get More Help

- Support – support@datacookbook.com
- Administrators Guide and User Guide
- Forum

Workflow Wednesday Series

- Workflow Wednesdays 3 PM EST
  - #3 March 28
    - Specification Approval Workflow

Thank you!