

User Permissions 101



This session reviews user permission levels available within a User Group. This includes permissions pertaining to specific objects, technical metadata, and access to data returned from failed quality assessments. Learn what levels are appropriate for specific tasks, and how to save time managing permissions for a large user population.

Workshop Wednesday #15

March 18 2020

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

- **Brenda Reeb**
 - IData, Data Management Consultant
 - breeb@idatainc.com

- **Jim Walery**
 - IData, Director of Marketing
 - jwalery@idatainc.com



Welcome

Say Hi in Chat – institution, number of people, what you want to learn about

Workshop Wednesdays on the horizon - 2PM EST

March 18 User Permissions 101

April – no session – Conference Season

May 20 Managing Reference Data

June 17 Tips to Manage Data Cookbook Content

Data Cookbook Help Page

idata

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data  **cookbook**

Quick definition lookup...

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[Definitions](#)

[Specifications](#)

[Quality](#)

[Data Systems](#)

[Organization](#)

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ACTING AS ADMINISTRATOR

What information are you looking for?

Search the Data Cookbook

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Training Resources



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Help

Training Resources

Resource	Description
Just-in-Time-Training Videos	Short videos that focus on specific features or tasks within Data Cookbook, such as creating a definition. Start here if you are a new user or if you perform a task within a workflow. Also includes workflow customization, specification templates, user groups, permissions, and other administrative tasks.
Workshop Wednesdays	This series offers topical discussions of features and best practices for Data Cookbook and data management. Videos are about 35 minutes long. Workshop Wednesdays are hosted live throughout the year and these are live recordings of sessions. The live sessions offer an opportunity to submit questions to IData staff. Use this series to interact with IData staff while you learn about a feature in depth.
Recorded Public Videos	Previously recorded webinars on various presented by IData that cover the Data Cookbook and Data Governance related subjects.
Upcoming Public Videos	View the schedule of upcoming Data Cookbook and Data Governance webinars.

Support

Support

Resource	Description
Email Support	Send an email to our dedicated Data Cookbook support for help with your specific question or issue
Phone Support	Call us toll Free at (877) IDATA44--(877) 432-8244--and press "1" for Data Cookbook support
Extra Data Cookbook Resources	Find additional client resources from Data Cookbook knowledge base for using and implementing the Data Cookbook.
Questions and Support forum	Browse questions asked by other users or post your own questions about how to work with the Data Cookbook.
System Announcements Forum	Find important announcements from the Data Cookbook development team, including information on recent updates to the application as well as planned outages

Documentation

Documentation

Document	Last Updated	Description
User's Guide	11/19/2019	Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.
Administrator's Guide	09/18/2019	Reference documentation for administrators of the Data Cookbook. The admin guide includes information on configuring the account as well as managing permissions and designing workflows.
External Authentication	08/21/2019	The Data Cookbook allows organizations to authenticate users through their existing authentication repositories. Currently it supports LDAP, Active Directory, CAS and Shibboleth protocols. This document provides details for administrators on configuring external authentication for your organization.
Test Instances	08/21/2019	Reference documentation for administrators and users who are working in the Test Instance of the Data Cookbook.
Metrics Dashboard	11/19/2019	Reference documentation for users for working with the Metrics Dashboard feature, which provides insights into your organization's usage of the Data Cookbook.
Private Community User's Guide	08/21/2019	Reference documentation for users who have access to a private community. This guide should be used in conjunction with the Data Cookbook User's Guide

More Support:

- Pop Up Help within Data Cookbook (triangle in lower right corner)
- Ask clients – Post to *Questions and Support* in the Forum

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Public Forums Search:

Forum	Topics	Posts	Last Post	Watched?
70 Data Cookbook News Stay up to date on news and information about the Data Cookbook. We use this forum to provide periodic updates on new features, plans and highlights of existing features.	71	85	14 days ago In: Next Data Cookbook Workshop Wednesday is... By: Jim Walery - IData Incorporated	Watch
115 System Announcements Important announcements from the Data Cookbook development team. This includes information on recent updates to the software as well as planned outages. Follow us on Twitter for News an	116	155	3 months ago In: November 2019 Release By: Aaron Walker - IData Incorporated	Watch
216 Questions and Support This forum is for any questions about how to work with the Data Cookbook. For direct, personal support use support@datacookbook.com	216	742	8 days ago In: Functional Areas List Very Difficult to ... By: Kristina Harvey - Simon Fraser University	Watch
11 Reporting Tool Integrations Use this forum to discuss tips and techniques for integrating the Data Cookbook with your reporting tools. See the Integrations page for more ideas.	11	31	11 months ago In: HTML customizations for pop-up By: Kristina Harvey - Simon Fraser University	Watch
5 Data Systems Use this forum to discuss any general practices for documenting data systems. Typically, these represent physical systems like ERP databases, warehouses, reporting databases, etc. Share your ideas on these.	5	20	7 months ago In: Using Workday ERP and Data Cookbook By: Cutler, Cynthia - Florida Gulf Coast	Watch

Workshop Wednesday Agenda

1. User Permissions and User Groups
 1. Objects
 2. Data Systems
 3. Research Data
2. User Permissions and Workflows
 1. Objects
3. Some differences Knowledge vs Enterprise

Permissions and User Groups

- 5 Levels
- 3 Things Permissions apply to
- 2 Matrices + Special Row
- Demo: Objects
- Demo: Data Systems and Research Data
- 2 ways to assign users to a User Group
- 3 ways to view Permissions

5 Levels

1. Hidden (Technical metadata)

Can see it exists; can't see it

2. View

See all info on all Objects, includes unapproved objects

3. Editor

Create New, Create New Version, edit right side panel

4. Manager

Same as Editor, plus Delete object and change Functional Area

5. Administrator

Same as Manager, plus system settings, codes, Approve on Import

3 Things Permissions Apply To

1. Objects

Definitions / Specs / Rules / Reference Data List

2. Data Systems

Banner / Argos Block / Data Mart / Slate

3. Research Data

Rows that fail Quality Rule threshold

2 Matrices + a Special Row

- Permissions Matrix
- Research Data (Enterprise) Matrix
- Data Systems Info ROW

Permissions Matrix for Objects

Data Stewards - Enrollment Edit

[Back to All User Groups](#)

Description:

Users in this group can manage definitions in the Enrollment functional area and can edit definitions in all other functional areas, including all technical information. They can manage Quality Rules in the Enrollment area and can edit quality rules in all functional areas.

Permissions

Functional Area	Information Requests	Specifications	Definitions	Data Quality Rules	All Technical Information
Data System Info					
All Areas					
Training University					
--Admissions					
--Advancement					
--Athletics					
--Enrollment					
--Facilities					
--Finance					
--Financial Aid					
--Human Resources					
--Information Technolo...					

Data Systems Info Row

Data System Editor

Edit

[Back to All User Groups](#)

Description:

Users in this group can add and edit information about any data system, including adding data schemas. This includes all data systems, specifications, and definitions. Permissions are extended to specifications and definitions so that users can view and edit technical information within those objects.

Permissions

Functional Areas	Information Requests	Specifications	Definitions	Data Quality Rules	All Technical Information	1. Enterprise Systems	2. Education Banner ERP System	3. My Campus Financials	4. My Security Access System	5. My Training Student System	6. PeopleSoft Campus Collaboration	7. Primary Systems	8. Research Infrastructure	9. Cosmos Data Mart	10. My Data Warehouse	11. My Reporting Ops	12. IData Hub Integration Systems	Other
Data System Info																		
All Areas																		
Training University																		
--Admissions																		
--Advancement																		

Demos

- Objects
- Data Systems Info
- Research Data

Permissions Matrix (for Objects)

Data Stewards - Enrollment Edit

[Back to All User Groups](#)

Description:

Users in this group can manage definitions in the Enrollment functional area and can edit definitions in all other functional areas, including all technical information. They can manage Quality Rules in the Enrollment area and can edit quality rules in all functional areas.

Permissions

Functional Area	Information Requests	Specifications	Definitions	Data Quality Rules	All Technical Information
Data System Info					
All Areas					
Training University					
--Admissions					
--Advancement					
--Athletics					
--Enrollment					
--Facilities					
--Finance					
--Financial Aid					
--Human Resources					
--Information Technolo...					

Objects - Manager – Reggie Stratton

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DEFINITION
Student Applicant Mailing Address
Comment (0 comments)
Add to my watch list
Show workflow

Approved Version 1 New version

FUNCTIONAL AREAS
Admissions
Enrollment

WORKFLOW
Definition Approval with Technical Review

DATA STEWARDS

View your organizations' terminology and definitions, both business (functional) definitions as well as technical definitions. Editors can create new definitions and moderators can approve them.

BROWSE OPTIONS
Browse by name only
Most recent first

Create a Definition
Definition Queue
Import Definitions
Missing Definitions

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DEFINITION
Student Applicant Mailing Address
Comment (0 comments)
Add to my watch list
Show workflow

Approved Version 1 New version

FUNCTIONAL DEFINITION: 0
The mailing address to which a [student applicant](#) receives mail during the admissions application process.

OTHER INFORMATION:
SOURCE OF DEFINITION: 0 None specified
CLASSIFICATION: 0

QUALITY ATTRIBUTES 0 No quality attributes defined

TECHNICAL DEFINITIONS 0
Data System: 1 Enterprise Systems - [Elucian Banner ERP System](#)
Time Context: None specified
Technical Definition:
[SRTADDR_STREET_LINE1](#)
[SRTADDR_STREET_LINE2](#)
[SRTADDR_STREET_LINE3](#)
[SRTADDR_STREET_LINE4](#)
[SRTADDR_HOUSE_NUMBER](#)
[SRTADDR_CITY](#)
[SRTADDR_STAT_CODE](#)
[SRTADDR_NATN_CODE](#)

SHRTEOD_CITY
SHRTEOD_CITY
SHRTEOD_ZIP

FUNCTIONAL AREAS 0
Admissions
Enrollment

WORKFLOW 0
Definition Approval with Technical Review

DATA STEWARDS 0
Data Stewards - Enrollment
Data Stewards - Admissions

SYNONYMS 0
No Synonyms

TAGS 0
No Tags

ATTACHMENTS 0

RELATED SPECIFICATIONS (1) 0
Incoming Freshman Report

RELATED DEFINITIONS (2) 0
student
Student Applicant

RELATED QUALITY RULES (0) 0
No Related Quality Rules

QUALITY ISSUES (0) 0
No Quality Issues

COMMUNITY SHARING (0) 0
There are no communities available. View your community settings [here](#).

Delete this definition Copy this version

Objects - Editor – Dan Helper

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DEFINITION

Student Applicant Mailing Address

Approved Version 1 [New version](#) [Show workflow](#)

Comment (0 comments)
On my watch list

View your organizations' terminology and definitions, both business (functional) definitions as well as technical definitions. Editors can create new definitions and moderators can approve them.

BROWSE OPTIONS

- Browse Definitions
- Create a Definition
- Definition Queue
- Browse by name only
- Most recent first

FUNCTIONAL AREAS

- Admissions
- Enrollment

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DEFINITION

Student Applicant Mailing Address

Approved Version 1 [New version](#) [Show workflow](#)

Comment (0 comments)
On my watch list

Functional Definition: ①

The mailing address to which a [student applicant](#) receives mail during the admissions application process.

Other Information:

SOURCE OF DEFINITION: ① None specified

CLASSIFICATION: ①

Quality Attributes ① No quality attributes defined

Technical Definitions ①

Data System: ① Enterprise Systems » [Ellucian Banner ERP System](#)

Time Context: None specified

Technical Definition:

- [SRTADDR_STREET_LINE1](#)
- [SRTADDR_STREET_LINE2](#)
- [SRTADDR_STREET_LINE3](#)
- [SRTADDR_STREET_LINE4](#)
- [SRTADDR_HOUSE_NUMBER](#)
- [SRTADDR_CITY](#)
- [SRTADDR_STAT_CODE](#)
- [SRTADDR_NATN_CODE](#)

FUNCTIONAL AREAS ①

- Admissions
- Enrollment

WORKFLOW ①

- Definition Approval with Technical Review

DATA STEWARDS ①

- Data Stewards - Enrollment
- Data Stewards - Admissions

SYNONYMS ①

- No Synonyms

TAGS ①

- No Tags

ATTACHMENTS ①

RELATED SPECIFICATIONS (1) ①

- Incoming Freshman Report

RELATED DEFINITIONS (2) ①

- student
- Student Applicant

RELATED QUALITY RULES (0) ①

- No Related Quality Rules

Objects - View – Ron Employee

This screenshot shows the datacookbook interface with a navigation menu overlay. The menu is green and contains the following items:

- Home
- Definitions (selected)
- Specifications
- Quality
- Data Systems
- Organization
- Community

The main content area shows the 'Student Applicant Mailing Address' definition page. A green box highlights the 'Browse Options' section, which includes:

- Browse by name only
- Most recent first

The page also displays the 'Functional Definition' and 'Other Information' sections.

This screenshot shows the datacookbook interface with the 'Student Applicant Mailing Address' definition page. The page is titled 'Student Applicant Mailing Address' and is marked as 'Approved' and 'Version 1'. The page content includes:

- Functional Definition:** The mailing address to which a [student applicant](#) receives mail during the admissions application process.
- Other Information:**
 - SOURCE OF DEFINITION:** None specified
 - CLASSIFICATION:** None specified
 - Quality Attributes:** No quality attributes defined
- Technical Definitions:**
 - Data System: Enterprise Systems » [Ellician Banner ERP System](#)
 - Time Context: None specified
 - Technical Definition:
 - [SRTADDR_STREET_LINE1](#)
 - [SRTADDR_STREET_LINE2](#)
 - [SRTADDR_STREET_LINE3](#)
 - [SRTADDR_STREET_LINE4](#)
 - [SRTADDR_HOUSE_NUMBER](#)
 - [SRTADDR_CITY](#)
 - [SRTADDR_STAT_CODE](#)
 - [SRTADDR_NATN_CODE](#)

The right sidebar contains the following sections:

- FUNCTIONAL AREAS (1):** Admissions, Enrollment
- WORKFLOW (1):** Definition Approval with Technical Review
- DATA STEWARDS (1):** Data Stewards - Enrollment, Data Stewards - Admissions
- SYNONYMS (1):** No Synonyms
- TAGS (1):** No Tags
- ATTACHMENTS (1):** None
- RELATED SPECIFICATIONS (1):** Incoming Freshman Report
- RELATED DEFINITIONS (2):** student, Student Applicant
- RELATED QUALITY RULES (0):** No Related Quality Rules
- QUALITY ISSUES (0):** No Quality Issues

Objects - Hidden Technical – Connie Sumer

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Edition

Home **Definitions** Specifications Quality Data Systems Organization Community

View your organizations' terminology and definitions, both business (functional) definitions as well as technical definitions. Editors can create new definitions and moderators can approve them.

Browse Definitions

Definition Queue

BROWSE OPTIONS

Browse by name only

Most recent first

Go

Report Quality Issue

Tasks ¹

You have no Task items

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Quick definition lookup...

Home **Definitions** Specifications Quality Data Systems Organization Community

DEFINITION

Student Applicant Mailing Address

Comment (0 comments)

Add to my watch list

Approved Version 1 [Show workflow](#)

Functional Definition: ¹

The mailing address to which a [student applicant](#) receives mail during the admissions application process.

Other Information:

SOURCE OF DEFINITION: ¹ None specified

CLASSIFICATION: ¹

Quality Attributes ¹ No quality attributes defined

Technical Definitions ¹

Data System: 1. Enterprise Systems [↳ Ellucian Banner ERP System](#)

Time Context: None specified

This technical definition requires additional permissions to view

History and Comments ¹ [View History](#)

1 : Approved (0 Comments) [show/hide version details](#)

FUNCTIONAL AREAS ¹

- Admissions
- Enrollment

WORKFLOW ¹

- Definition Approval with Technical Review

DATA STEWARDS ¹

- Data Stewards - Enrollment
- Data Stewards - Admissions

SYNONYMS ¹

- No Synonyms

TAGS ¹

- No Tags

ATTACHMENTS ¹

RELATED SPECIFICATIONS (1) ¹

- Incoming Freshman Report

RELATED DEFINITIONS (2) ¹

- student
- Student Applicant

Objects - Administrator – John Admin

This screenshot shows the 'datacookbook' interface with the 'Definitions' menu open. The menu options include 'Browse Definitions', 'Create a Definition', 'Definition Queue', 'Import Definitions', and 'Missing Definitions'. A sub-menu for 'BROWSE OPTIONS' is also visible, with options for 'Browse by name only' and 'Most recent first'. The background shows the 'Student Applicant Mailing Address' definition page.

This screenshot shows the 'Student Applicant Mailing Address' definition page. The page includes a 'Functional Definition' section with a description: 'The mailing address to which a student applicant receives mail during the admissions application process.' It also features 'Other Information' such as 'SOURCE OF DEFINITION' (None specified) and 'CLASSIFICATION'. A 'Technical Definitions' section lists attributes like 'SRTADDR_STREET_LINE1' through 'SRTADDR_NATN_CODE'. A 'Quality Attributes' section indicates 'No quality attributes defined'. The right sidebar contains various metadata sections: 'FUNCTIONAL AREAS' (Admissions, Enrollment), 'WORKFLOW' (Definition Approval with Technical Review), 'DATA STEWARDS' (Data Stewards - Enrollment, Admissions), 'SYNONYMS' (No Synonyms), 'TAGS' (No Tags), 'ATTACHMENTS', 'RELATED SPECIFICATIONS' (Incoming Freshman Report), 'RELATED DEFINITIONS' (student, Student Applicant), 'RELATED QUALITY RULES' (No Related Quality Rules), 'QUALITY ISSUES' (No Quality Issues), and 'COMMUNITY SHARING' (No communities available). At the bottom, there are buttons for 'Delete this definition' and 'Copy this version'.

This screenshot shows the 'Preview Definitions from CSV' page. It displays a message: 'No errors found in your import. Please make sure the definitions are as you want them.' Below this, there is a checkbox for 'Automatically approve pending Definitions?' and a help icon. A note states: 'Once started, the import will occur in the background and can be monitored on the Background Jobs page.' At the bottom, there is a button labeled 'Accept and import!'.

Data Systems Info Row

Data System Editor

Edit

[Back to All User Groups](#)

Description:

Users in this group can add and edit information about any data system, including adding data schemas. This includes all data systems, specifications, and definitions. Permissions are extended to specifications and definitions so that users can view and edit technical information within those objects.

Permissions

Functional Areas	Information Requests	Specifications	Definitions	Data Quality Rules	All Technical Information	1. Enterprise Systems	2. Education Banner ERP System	3. My Campus Financials	4. My Security Access System	5. My Training Student System	6. PeopleSoft Campus Collaboration	7. Primary Systems	8. Research Infrastructure	9. Cosmos Data Mart	10. My Data Warehouse	11. My Reporting Ops	12. IData Hub Integration Systems	Other
Data System Info																		
All Areas																		
Training University																		
--Admissions																		
--Advancement																		

Data Systems Info – Editor - Tech Nichols

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Home Definitions Specifications Quality **Data Systems** Organization Community

Data Systems

View your organization's data systems. This includes technical details about all of the systems as well as resources for learning more about them.

1. Enterprise Systems

Filter by Data System Usage Type: Database

Ellucian Banner ERP System

Technology: Oracle / 10.0.4
Data Model: [Browse Data Model](#)

Related Items: [7 Specifications](#), [16 Definitions](#), [9 Quality Rules](#), [8 Reference Data](#)

System Owner: [George Smith](#)
Access Contact: [Dan Helper](#)

Resources: [Admin Guide Training Module](#)

Other Information: Backup Code: Level 2

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Home Definitions Specifications Quality **Data Systems** Organization Community

DATA SYSTEM

Ellucian Banner ERP System

Group: 1. Enterprise Systems
Application: Ellucian Banner

[Edit](#) [Back to List](#)

Details:

DATA SYSTEM USAGE: [Database](#)
DATA SYSTEM VERSION: Banner 8.3
TECHNOLOGY TYPE: [Oracle](#)
TECHNOLOGY VERSION: 10.0.4
ENABLE FOR INTEGRATION: [No](#)
FREQUENCY: [manual](#)

DATA MODEL: [Browse Data Model](#)

DATA MODEL CHANGES NOTIFICATION GROUP: [Not specified.](#)

DESCRIPTION:
This is the primary ERP system for student, finance, and human resources data.

Usage

- [7 Specifications](#)
- [16 Definitions](#)
- [9 Quality Rules](#)
- [8 Reference Data](#)

Data Model

[Browse Data Model](#)
SATURN

Resources

[Admin Guide Training Module](#) [view file details](#)

Data Systems Info – View – Ron Employee

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Home Definitions Specifications Quality **Data Systems** Organization Community

Data Systems

These represent the different systems you use in your organization. Examples include ERP systems, Reporting ODS systems, and Data Warehouses. These display when viewing technical definitions.

Search:

[Browse Data Systems](#)

Filter by Data System Usage Type: Data Systems

1. Enterprise Systems

Data systems that comprehensively manage key operational areas such as enrollment, human resources, and finance.

Ellucian Banner ERP System This is the primary ERP system for student, finance, and human resources data.	Usage: Database Version: Banner 8.3 Technology: Oracle / 10.0.4 Data Model: Browse Data Model	System Owner: George Smith Access Contact: Dan Helber
	Related Items: 7 Specifications 16 Definitions 9 Quality Rules 8 Reference Data	Resources: Admin Guide Training Module
		Other Information: Backup Code: Level 2

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Home Definitions Specifications Quality **Data Systems** Organization Community

DATA SYSTEM

Ellucian Banner ERP System

Group: 1. Enterprise Systems
Application: Ellucian Banner

[Back to List](#)

Details:

DATA SYSTEM USAGE: Database
DATA SYSTEM VERSION: Banner 8.3
TECHNOLOGY TYPE: Oracle
TECHNOLOGY VERSION: 10.0.4
ENABLE FOR INTEGRATION: No
FREQUENCY: manual

DATA MODEL: [Browse Data Model](#)

DATA MODEL CHANGES NOTIFICATION GROUP: Not specified.

DESCRIPTION:
This is the primary ERP system for student, finance, and human resources data.

GENERAL NOTES:
We are in the process of migrating from one system to another. The Banner system will remain in effect in production for at least another 12 months.

Usage

- 7 Specifications
- 16 Definitions
- 9 Quality Rules
- 8 Reference Data

Data Model

- [Browse Data Model](#)
- SATURN

Resources

- [Admin Guide Training Module](#) [view file details](#)

Data Systems Info - Hidden – Connie Sumer

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Tasks ⓘ
You have no Task items.

My Feed ⓘ

My Information Requests ⓘ

Browse Data Systems
View your organization's data systems. This includes technical details about all of the systems as well as resources for learning more about them.

[Report Quality Issue](#)

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Data Systems ⓘ ⓘ

These represent the different systems you will want to provide technical details about. Typically, these represent your different databases or systems. Examples are ERP systems, Reporting ODS systems, Warehouses and other auxillary systems. You can also control the order these display when viewing technical definitions in the section below this table. Please note that specifications can have several data systems defined.

Filter by Data System Usage Type: Database Protocol

1. Enterprise Systems
Data systems that comprehensively manage key operational areas such as enrollment, human resources, and finance.

- Ellucian Banner ERP System**
This is the primary ERP system for student, finance, and human resources data.
- My Campus Financials**
This system contains the operational financial data of the institution, in real time. This system is hosted on campus at one of the data centers. It excludes the Medical Center.
- My Security Access System**
This system manages the ID card swipe entry access to all rooms on the North Campus.
- My Training Student System**
This is a training data system that has a data schema created manually. It is used to demo technical metadata.
- Oracle / PeopleSoft Campus Solutions**
This is the main student system with several modules. Includes the Enrollment and Degree Planning module and the Student Financing module.

2. Primary Systems
Systems that manage the operations of a single department or operational activity such as athletics or facilities.

- My Student Athlete System**
This enterprise system manages athletes, teams, schedules, eligibility, game or competition results, and coaching staff for all NCAA athletic

Data Systems Info – Admin – John Admin

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Home Definitions Specifications Quality **Data Systems** Organization Community

Data Systems

These represent the different systems you use in your organization. Examples include ERP systems, Reporting ODS systems, and Data Warehouses. These display when viewing technical definitions.

Filter by Data System Usage Type: Data Systems

- 1. Enterprise Systems

Data systems that comprehensively manage an organization's data.

Ellucian Banner ERP System

This is the primary ERP system for student, finance, and human resources data.

System Owner: [George Smith](#)
Access Contact: [Dan Helper](#)

Resources:
[Admin Guide Training Module](#)

Other Information:
Backup Code: Level 2

Technology: Oracle / 10.0.4
Data Model: [Browse Data Model](#)

Related Items: [7 Specifications](#), [16 Definitions](#), [9 Quality Rules](#), [8 Reference Data](#)

View your organization's data systems. This includes technical details about all of the systems as well as resources for learning more about them.

- Browse Data Systems
- Create a Data System
- Create a Data System Group
- Data Applications

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ACTING AS ADMINISTRATOR

DATA SYSTEM

Ellucian Banner ERP System

Group: 1. Enterprise Systems
Application: Ellucian Banner

[Edit](#) [Back to List](#) [Delete](#)

Details:

DATA SYSTEM USAGE: [1](#) Database
DATA SYSTEM VERSION: Banner 8.3
TECHNOLOGY TYPE: [1](#) Oracle
TECHNOLOGY VERSION: 10.0.4
ENABLE FOR INTEGRATION: [1](#) No
FREQUENCY: [1](#) manual

DATA MODEL: [1](#) [Browse Data Model](#)

DATA MODEL CHANGES NOTIFICATION GROUP: [1](#) Not specified.

DESCRIPTION:
This is the primary ERP system for student, finance, and human resources data.

Usage

- 7 Specifications
- 16 Definitions
- 9 Quality Rules
- 8 Reference Data

Data Model

- [Browse Data Model](#)
- SATURN

Resources

- [Admin Guide Training Module](#) [view file details](#)

Research Data – Edit - Reggie Stratton

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★ On my watch list

57: Threshold exceeded for International Student Credit Hour Threshold

Drafting [Show workflow](#) [Ready for research](#) [Close issue](#)

[Edit](#)

Description:
Manual run to check new international students who arrived late for the semester due to visa issues.
[Add Research Data](#)

New Research Data
* Data System:

Select a File to Upload [Choose File](#)

* Summary

Note
To use a browser context menu should hold down 'Ctrl'.

* Functional areas

[Create](#) [Cancel](#)

- FUNCTIONAL AREAS ① Enrollment
- DATA SYSTEMS ① Ellucian Banner ERP System
- RELATED DEFINITIONS ① No Related Definitions
- RELATED SPECIFICATIONS ① No Related Specifications
- RELATED QUALITY RULES (1) ① International Student Credit Hour Threshold

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57: Threshold exceeded for International Student Credit Hour Threshold

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[Edit](#)

Description:
Manual run to check new international students who arrived late for the semester due to visa issues.
[Add Research Data](#)

Research Data was added by [Reggie Stratton](#) on February 5, 2020 ①

Summary: Data contains student ID and number of credit hours enrolled.
Functional Areas: [Enrollment](#)
Data System: 1. Enterprise Systems » [Ellucian Banner ERP System](#)
Attachment:

ID	Number Credit Hours
987674	6
908582	3
254980	20
256184	6
456281	6
951328	9
751682	3
619845	3

[Hide Research Data](#)

- FUNCTIONAL AREAS ① Enrollment
- DATA SYSTEMS ① Ellucian Banner ERP System
- RELATED DEFINITIONS ① No Related Definitions
- RELATED SPECIFICATIONS ① No Related Specifications
- RELATED QUALITY RULES (1) ① International Student Credit Hour Threshold

Research Data – View – Peter Jones

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Drafting [Show workflow](#)

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Research Data was added by [Reggie Stratton](#) on February 5, 2020

Summary: Data contains student ID and number of credit hours enrolled.

Functional Areas:
[Enrollment](#)

Data System: [Enterprise Systems](#) » [Ellucian Banner ERP System](#)

[View Research Data](#)

Comments

Add a Comment:

No comments and system events on this version.

- FUNCTIONAL AREAS 1
Enrollment
- DATA SYSTEMS 1
Ellucian Banner ERP System
- RELATED DEFINITIONS 1
No Related Definitions
- RELATED SPECIFICATIONS 1
No Related Specifications
- RELATED QUALITY RULES (1) 1
International Student Credit Hour Threshold

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Enrollment
- DATA SYSTEMS 1
Ellucian Banner ERP System
- RELATED DEFINITIONS 1
No Related Definitions
- RELATED SPECIFICATIONS 1
No Related Specifications
- RELATED QUALITY RULES (1) 1
International Student Credit Hour Threshold

[Hide Research Data](#)

Research Data – Hidden Connie Sumer

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QUALITY ISSUE [Comment \(0 comments\)](#)
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57: Threshold exceeded for International Student Credit Hour Threshold

Drafting [Show workflow](#)

Description:
Manual run to check new international students who arrived late for the semester due to visa issues.

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Functional Areas:
[Enrollment](#)

Data System: 1. Enterprise Systems » [Ellucian Banner ERP System](#)

[View Research Data](#)

Comments

Add a Comment:

No comments and system events on this version.

- FUNCTIONAL AREAS** ①
Enrollment
- DATA SYSTEMS** ①
Ellucian Banner ERP System
- RELATED DEFINITIONS** ①
No Related Definitions
- RELATED SPECIFICATIONS** ①
No Related Specifications
- RELATED QUALITY RULES** (1) ①
[International Student Credit Hour Threshold](#)

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57: Threshold exceeded for International Student Credit Hour Threshold

Drafting [Show workflow](#) [Ready for research](#) [Close issue](#)

[Edit](#)

Description:

Manual run to check new international students who arrived late for the semester due to visa issues.

Research Data was added by [Reggie Stratton](#) on February 5, 2020 [i](#) [i](#)

Summary: Data contains student ID and number of credit hours enrolled.

Functional Areas:
[Enrollment](#)

Data System: 1. Enterprise Systems » [Ellucian Banner ERP System](#)

[View Research Data](#)

- FUNCTIONAL AREAS** [i](#) [✎](#)
[Enrollment](#)
- DATA SYSTEMS** [i](#) [✎](#)
[Ellucian Banner ERP System](#)
- RELATED DEFINITIONS** [i](#) [✎](#)
No Related Definitions
- RELATED SPECIFICATIONS** [i](#) [✎](#)
No Related Specifications
- RELATED QUALITY RULES (1)** [i](#) [✎](#)
[International Student Credit Hour Threshold](#)

2 Ways to Assign

1. User Profile Page
2. User Group Page

Default assignment to All Users group upon user account creation.

User Page

User Groups ⓘ

[Administrators](#)

[All Users](#)

[Data Stewards - All Areas](#)

remove

[Data Stewards - Enrollment
Information Request Assignees](#)

remove

remove

Add this user to a new group

Type or Select...

[Data Stewards - Human Resources](#)

[Data Stewards - International Activity](#)

User Group Page

Add/Remove Users

Add a user. After checking/unchecking users you MUST click the 'Update' button at the bottom of the page.

Type or Select...

×



[Lettie Mein](#)



Update

Cancel

3 Ways to View

1. User home page
2. User Group Page
3. Permissions link under Organization Tab

User Home Page – Reggie

User Permissions ⓘ

Information Request Permissions: Manager

Specification Permissions:

Permission	Functional Areas
viewer	
editor	
manager	<ul style="list-style-type: none">• Training University• -- Admissions• -- Advancement• -- Athletics• -- Enrollment• -- Facilities• -- Finance• -- Financial Aid• -- Human Resources• -- Information Technology• -- International Activity• -- Sponsored Research• -- Student Account• -- Student Life• -- Training• -- Unassigned

Definition Permissions:

Role	Functional Areas
viewer	
editor	
manager	<ul style="list-style-type: none">• -- Enrollment• Training University• -- Admissions• -- Advancement

User Group

Data Stewards - Enrollment

Edit

[Back to All User Groups](#)

Description:

Users in this group can manage definitions in the Enrollment functional area and can edit definitions in all other functional areas, including all technical information. They can manage Quality Rules in the Enrollment area and can edit quality rules in all functional areas.

Permissions

Functional Area	Information Requests	Specifications	Definitions	Data Quality Rules	All Technical Information
Data System Info					
All Areas					
Training University					
--Admissions					
--Advancement					
--Athletics					
--Enrollment					
--Facilities					
--Finance					
--Financial Aid					
--Human Resources					
--Information Technolo...					

Organization Tab > Permissions

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Permissions

- ⊕ [Information Request Permissions](#)
- ⊕ [Definition Permissions](#)
- ⊕ [Specification Permissions](#)
- ⊖ [Data Quality Rules Permissions](#)

	viewer	editor	manager
Training University	(All Groups)	Data Stewards - Admissions Data Stewards - Enrollment Data Stewards - Finance Data Stewards - Advancement Data Stewards - Sponsored Research Report Writer - Financial Aid Data Stewards - Student Account Report Managers Data Stewards - Human Resources Definition Standards Reviewers Data System Editor Data Stewards - Athletics Data Stewards - Student Life Data Stewards - Facilities Data Stewards - Financial Aid Quality Managers Quality Editor - Student Data Information Request Manager Information Request Assignees	Quality Managers Quality Editor - Student Data Information Request Manager Information Request Assignees

User Permissions and Workflow

- This section assumes some Workflow admin experience
- Forget the User Groups
- Get permissions at the Step
- Permissions only good for objects in that Step
- 2 permission levels
 - Edit | Collaborate
- Approval occurs via Transition Actions. It is unrelated to permissions.

Allowable Actions within a Step

Stage: Data Steward Review ⓘ

Name	Initial Stage	Default Next Stage (Happy Path)	Count of active objects
Data Steward Review		HR Security Review	Active Objects (1)

Steps ⓘ

Name	Description	Required	Generate Task Items	Users required to act	Allowable Actions	Timeout	Stage Transition Actions	Conditions	Assignments
Review Definition	Review this definition to be sure it follows our standard practices. Approve when ready.	no	yes	any	Edit Collaborate	0	Approve Reject Back to drafting		Data Stewards by Functional Area

conditions

Allowable Actions – no actions!

Stage: Data Governance Team Review ⓘ

Name	Initial Stage	Default Next Stage (Happy Path)	
Data Governance Team Review	✓	Approved	edit

Steps ⓘ

Name	Description	Required	Generate Task Items	Users required to act	Allowable Actions	Timeout	Stage Transition Actions	Conditions	Assignments	
DG Team Reviews	Review the definition. Click Approve if satisfied. If not, click Return to Drafting.	yes	yes	any		0	Approve Reject		Data Governance Team	conditions edit x

Transition Action grants Approve

DEFINITION

Academic Advisor

 Comment (1 comment)

 Add to my watch list

Review

Version 1



[Show workflow](#)

Approve

Other Actions 

 Edit

Functional Definition: 

The person who provides academic advising to a [student](#) in a formally acknowledged relationship.

Other Information:

SOURCE OF DEFINITION:  None specified

CLASSIFICATION:  [Internal](#)

 FUNCTIONAL AREAS

[Enrollment](#)

Back to drafting

Reject

 WORKFLOW 

[Definition Approval](#)

 MODERATORS 

[Data Stewards - Enrollment](#)

 SYNONYMS 

No Synonyms



Summary

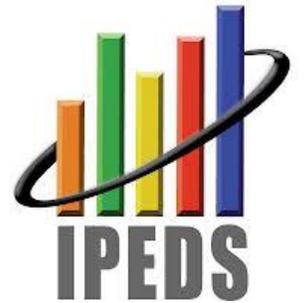
- Functional Areas are key element – sets the grain
- Be generous with Editor, be stingy with Manager
- Everyone initially lands in All Users and stays there until an Administrator manually moves them to another User Group.
- Permissions are independent of Data Governance roles.
- Permissions are independent of who “Approves” objects
- Take time to understand Data System Info vs Technical metadata permissions.

Be Part of the Community



community.datacookbook.com

- Open to everyone
- Content from regulatory agencies and other institutions.
- Data definitions, Specifications, Contact information, Documentation



Common Data Set Initiative

*A collaborative effort between publishers
and the educational community*



Watch for your community forum news emails

News Updates

News, Updates, & Social Media

Resource	Description
Data Cookbook News	Stay up to date on news and information about the Data Cookbook. We use this forum to provide periodic updates on new features, plans and highlights of existing features.
IData News	Browse the latest public news and announcements from the Data Cookbook website
Twitter	Follow us on Twitter!
IData YouTube Channel	Find content recorded by IData experts on Data Governance topics

Additional Resources

Resource	Description
Data Cookbook Forums	Browse all the Data Cookbook Community forums.
Data Insights Blog	See the latest blog postings from our staff on various subjects including Data Cookbook and Data Governance

Workshop Wednesday 2020

- Purpose: Short, fun, and focused on features
- Upcoming Dates and Topics:
 - March 18 User Permissions 101
 - April – no session – *Virtual* Conference Season
 - May 20 Managing Reference Data
 - June 17 Tips to Manage Data Cookbook Content
- Review Previous and Upcoming Workshop Wednesdays Here:
 - <https://go.idatainc.com/dcb-workshops>
- Contact Brenda if you'd like to suggest a topic
 - breeb@idatainc.com

Upcoming Webinars 2019-2020

- <http://www.idatainc.com/about-us/idata-webinars/>

Upcoming Webinars

- Tues., Dec. 3 - Getting Started with Data Governance 2-3pm Eastern
- Thurs., Jan. 30 - Just-in-time Data Governance 2-3pm Eastern
- Tues., Feb. 11 - The Data Cookbook and a Pragmatic Approach for Implementing Data Governance 2-3:30pm Eastern
- Tues., Feb. 25 - Data Stewardship Best Practices 2-3pm Eastern
- Thurs., March 19 - Data Governance Best Practices 2-3pm Eastern
- Tues., April 21 - Where is My Data? Creating a Data System Inventory 2-3pm Eastern

Registration and More Webinars

Data Governance Resources Page

Data Governance Resources

Recorded Webinars

IData experts have recorded an entire webinar series on pragmatic data governance including [Overview](#).

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Upcoming Webinars

IData has upcoming Data Governance webinars determined by interest of our webinar attendees.

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