Collections
and
Impact Analysis (deferred)

Workflow Wednesday Series #4

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

Recorded Data Governance Webinars

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

idata Data Management for Higher Education

PROBLEMS WE SOLVE	PRODUCTS	PORTFOLIO	PARTNERS	INSIGHTS	ABOUT US

Recorded Webinars

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
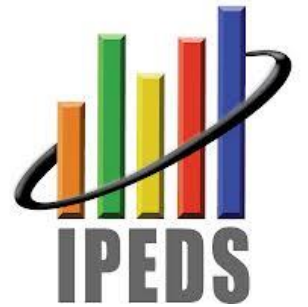
Upcoming webinars at: http://www.idatainc.com/about-us/idata-webinars/

Be Part of the Community

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

Connect with Us

idata
Data Management for Higher Education

Follow us on LinkedIn for company and product information
www.linkedin.com/company/idata-incorporated

Follow Us on Twitter for to the minute information
@idatainc and @datacookbook

Subscribe to YouTube Channel for how to videos
www.youtube.com/user/DataCookbook

Subscribe to our blog posts for educational information
www.datacookbook.com/news/

Let Us Know

- Interested in any of the following:
  - ➢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

Mega Agenda

- Collections
- Impact Analysis

Agenda - Collections

- Demo
- Use Cases
- Examples
- Workflow and Permissions
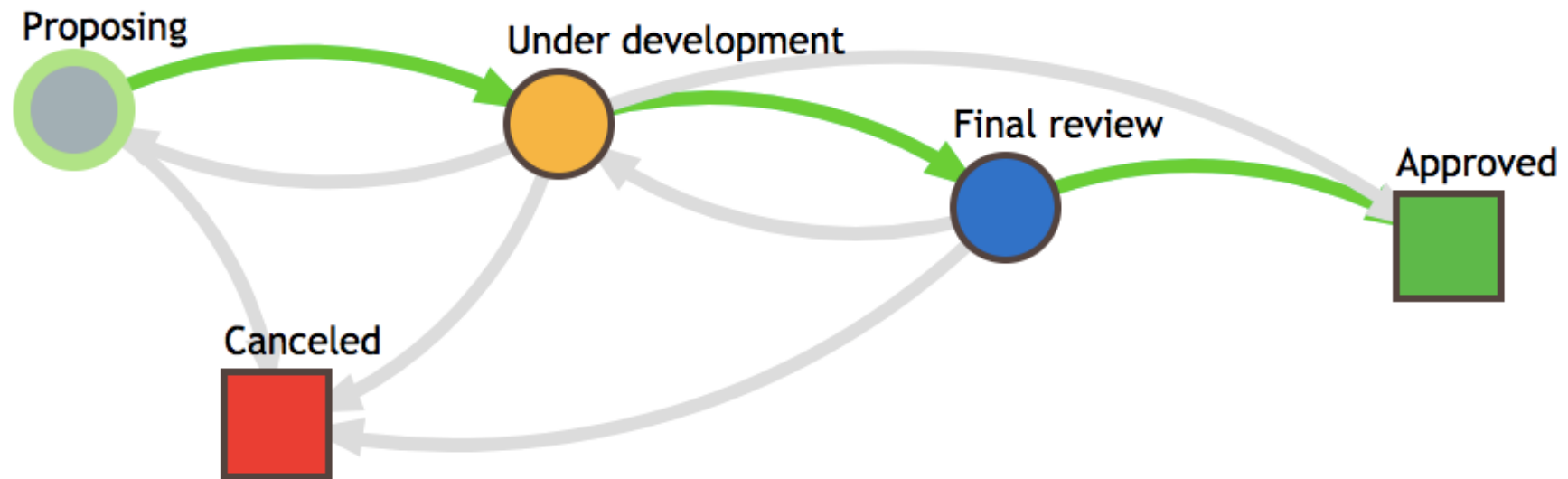- Search and discovery

Insert complex dashboard

Demo

- Trains.demo.datacookbook.com
  - Student Recruitment Core Reports
    - Admissions Pipeline by Financial Aid Need
    - Incoming Freshman Report
    - Financial Aid Awards in Progress
  - Policy - Data Sharing Agreements
    - Financial Aid Awards in Progress – double dipped
  - Example - Collection as repository of data sharing agreements.
    - Option 1 - Policy doc as collection attachment; link to spec. Note lose 1:1 connection between spec and DSA.
    - Option 2 – Collection as collation of reports that utilize a DSA. Attach DSA to Spec. Link specs to Collection. Attach blank DSA template to Collection

  - Permissions – included with Specifications
  - Report Manager –BI – Lisa Lang
  - Report Writers – jill yun

- Create new – Admissions Pipeline – Lisa Lang

Demo – Create New –

- Starting Point – Create Collection or Create Specs?
  - Start with Specs, then Collection. Can only link the 2 at the Collection page, so have the specs ready to avoid revisiting Collections.

Default Workflow

- 1 Conditional
  - Functional Area

Permissions

Embedded with Specifications

Add Spec to Collection, not vice versa

Use Cases

- Annual Report

- Fact Book

- Complex Dashboard

- Operational report bundles

- Policy

Search and discovery

- Search and Indexing
  - Home Search
    - Approved Objects – **keyword "upstream"**
    - Indexes Collections, only returns the Specifications
  - Browse Search
    - Specifications – **keyword "upstream"**
      - Retrieves specifications linked to a Collection that contains search keyword. NOTE the specs themselves may not contain the keyword.
    - Collections
      - Retrieves collections that contain the keyword.

Agenda – Impact Analysis

- List of Related Objects
- 2 – Step Process
  - Indicate Yes/No
  - Respond
- Purely informational. Does not affect Workflows.
- Demo

Related Objects

Related objects are impacted by changes to the object

Object	Related Objects
Definitions	Specification Quality Rule Reference Data Data System
Specification	Definition Collection Data System
Collection	Specification
Quality Rule	Definition
Reference Data	Definition, via Quality Rule
Information Request	Can become a Specification
Quality Issue Resolution	Can become a Quality Rule

Demo

- From an Approved Spec **Student Listing**, request a Change. Note no impacts listed on Approved.
  - Version in progress, has impacted definitions
    - Indicate yes/no
- Anyone can edit Impacts during the workflow. Edits overwrite earlier decisions.

Workflow Wednesday Series
3 PM EST

idata
Data Management
for Higher Education

#5 on June 6 - Data Request Process - 3 Ways with Specs

No session July or August

Back in September!

Get Help and Thank you!

- Pop Up Help within Data Cookbook (triangle in lower right corner)
- Ask clients – Post to *Questions and Support* in the Forum
- Ask IData Staff – support@datacookbook.com
- Visit http://support.datacookbook.com
- Visit **Help** link within Data Cookbook
  - Administrators Guide (check for updates)
  - User Guide (ditto)

Extra slides