

Learn About Recent Enhancements:

- Workflow
- User management
- Editing data models and more



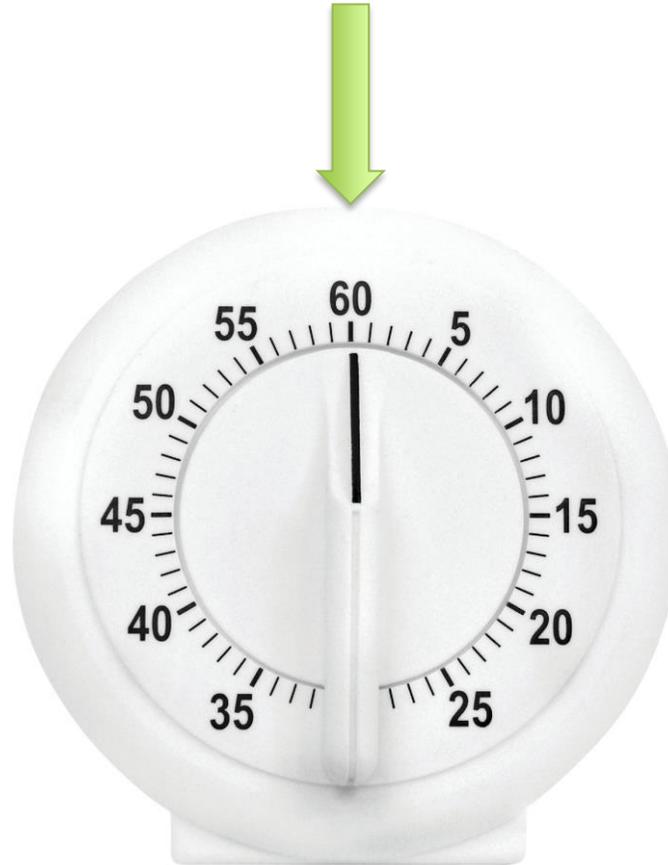
Workshop Wednesday #23

November 16, 2022

Logistics

60 minute
Session

Last 15 minutes
Q&A
NOT
recorded

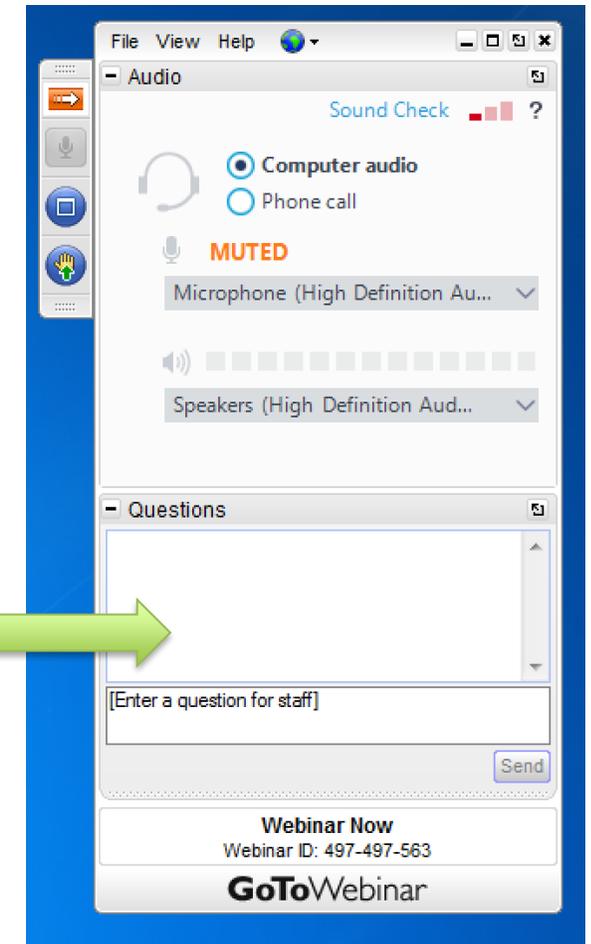


1st 45 minutes
Presentation
recorded



Logistics

- You will receive the link to the recording within 1-2 days
Closed captioning is included.
- Meeting software – GoToWebinar
 - Everyone default muted. We will unmute you individually to speak during Q&A.
 - Questions? Enter them in the chat box.
- Workshop Survey
 - Please complete the survey at the end>



Welcome

Say Hello in Chat – institution, number of people,
questions you want answered today



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Training Resources



[Andy Berry \(Log out\)](#) [Help](#) [Recent Updates](#)

data cookbook

Quick definition lookup...

[Home](#)

[Definitions](#)

[Specifications](#)

[Quality](#)

[Data Systems](#)

[Organization](#)

[Community](#)

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.
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Recorded Public Videos	Previously recorded webinars on various presented by IData that cover the Data Cookbook and Data Governance related subjects.
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Workshop Wednesday Agenda

- Release information
- Enhancements:
 1. Expanded “Copy”
 2. Expanded Tools
 3. Do more with individual users
 4. Manage User Groups and Permissions
 5. Edit Schema Objects
 6. Expanded Import Specifications
- Q&A (not recorded)
- Schedule Office Hours for assistance



Releases Information

3 Releases: June | September | November

A screenshot of the Data Cookbook navigation menu. The menu is green and contains the following items: Data Catalog, Organization, Community, Organizations, Definitions, Specifications, Forums (highlighted with a dark green background and a magnifying glass icon), and Copy Queue. Below the menu, a table snippet shows a row with the number 145 and a link to 'Forums'.

A screenshot of the Data Cookbook Public Forums page. The page features a green header with the 'SAMPLE' logo, user information 'sample IData Admin Admin Enabled', and the 'datacookbook' logo with a search bar. The navigation menu includes Home, Glossary, Reports/ETLs, Quality, Data Catalog, Organization, and Community. Below the menu are filters for Public, K-12, and Higher Education, and a search bar. The main content is titled 'Public Forums' and contains a table of forum topics.

Forum	Topics	Posts	Last Post	Watched?
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.	145	161	24 days ago In: Upcoming Workshop Wednesday - Discussion... By: Jim Walery - IData Incorporated	Watch
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	146	197	about 6 hours ago In: Release Notes--November 2022 By: Aaron Walker - IData Incorporated	Watch

1. Expanded “copy”

- More efficient, reduce repetitive actions
 - User groups
 - Workflows

2. Expanded Tools

- Rivals Data System
- Type
- Owner
- Access contact
- Access info
- Other info
- Logo

TOOL

Tableau



Tool Type: Data Visualization Tool

Description:

A dashboard platform used for any type of reporting.

Details

Related Data Systems: ⓘ

[My Student Athlete System](#) [ODS](#)

Owner ⓘ

[Show Details](#) ▼Tech Nickles ([User Profile](#))

Access Contact ⓘ

[Show Details](#) ▼Dan Helper ([User Profile](#))

Owner ⓘ

Tech Nickles ([User Profile](#))
breeb+tnickles@idatainc.com
Sample

Access Details: ⓘ

We have an enterprise license. Contact IT Help Desk to request access.

Other Information: ⓘ

Contact IT Help Desk for assistance in cancelling your local license and migrating to the enterprise license.

Usage

This tool is used on

[1 Collection](#)[3 Specifications](#)

3. Do more with individual users

1. Workflows
2. Additional Attribute - Contact
3. Bulk import as "proxy"
4. Manage User Groups and permissions

3.1 Workflows

1. Use users instead of user groups
 - a. Name a specific user by choosing their username; no need to put user in user group, then add the user group

2. Reference data and Quality issues – generated via iDataHub
 - a. Auto-refresh reference data (valid values)
 - b. Auto-create Quality Issue

Conditional Quality Issue Workflow

- Conditional on origination method
- What happens after first Stage – don't care; anything can happen

Auto Created Quality Issue Resolution

[Back to All Workflows](#)

Type: Quality Issue Resolution | Status: **active** | Version: 1 [Active Objects \(0\)](#)

[Edit Workflow](#)

[Create a New Version](#)

[Delete](#)

[Copy](#)

[Print](#)

Description:

This conditioned workflow will alert the Quality Manager in the first stage. This action is conditional on the IDataHub auto-generating the issue due to a quality rule that surpasses its threshold.

Conditions: ⓘ

Origination Method is Automatic (Integration API)

Workflow-level Automatic Named Role Assignments: ⓘ

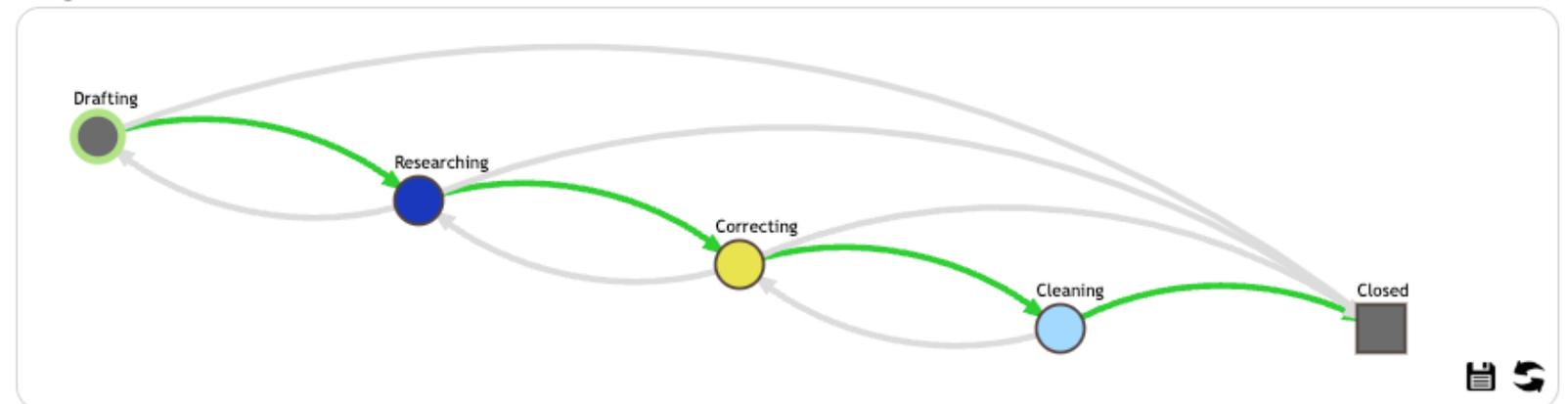
Named Role ⓘ

User Mapping ⓘ

Designated Requester

[Quality Rule Role Manager](#)

Diagram: ⓘ



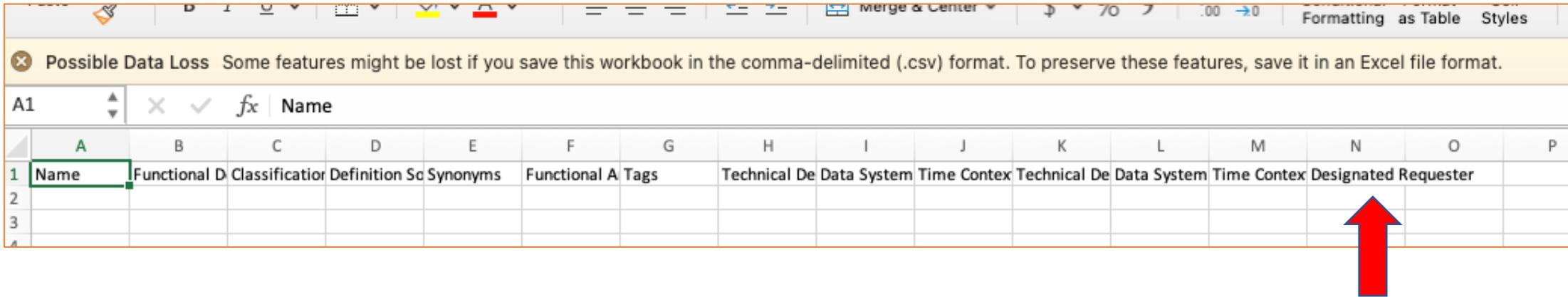
3.2 Additional Attribute: Contact

- Name
- Email address
- Phone
- Title
- Organization
- Website
- Notes

SAMPLE

- Ellucian Banner – Renewal Business Manager
- Cyril Payer - Not a DCB user

3.3 Bulk import definitions as Proxy



Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

A1	Name	Functional D Classification	Definition Sc Synonyms	Functional A Tags	Technical De Data System	Time Contex	Technical De Data System	Time Contex	Designated Requester
1	Name	Functional D Classification	Definition Sc Synonyms	Functional A Tags	Technical De Data System	Time Contex	Technical De Data System	Time Contex	Designated Requester
2									
3									
4									

John Admin imported definitions; named Reggie as Designated Requester

DEFINITION

Academic Credit

Comment (0 comments)
★ On my watch list

Drafting Version 1 ⚠️¹ [Hide workflow](#)

You have tasks assigned in the current workflow stage:

- Drafting ⓘ

[Primary Definition Approval](#)

Drafting → Data Steward Review → Technical Definition Review → Standards Review → Approved

VERSION CREATOR: [John Admin](#) COLLABORATORS: +

DESIGNATED REQUESTER: ⓘ [Reggie Stratton](#)

WORKFLOW STARTED: 11/16/2022
[Impact Analysis](#) ⓘ

4. Manage user groups and user permissions

- Copy
- Inherit permissions

SAMPLE

- Data Cookbook Content Manager
- Data Stewards – Advancement
- Data Stewards – Athletics

Parallel Design in User Groups

Data Stewards - Advancement

Edit Copy

Description:

Users in this group have Manager permissions for definitions in this functional area.

Users (1)

[Myra Chunckel](#)

Permissions and Inheritance

Inheritance Rules

- New data systems inherit viewer data system permissions
- New data systems inherit viewer technical permissions
- New data systems inherit hidden research data permissions
- New functional areas inherit viewer specifications permissions
- New functional areas inherit viewer definitions permissions
- New functional areas inherit viewer data quality rules permissions

Permissions

Functional Areas	Information Requests	Specifications	Definitions	Data Quality Rules
All Areas	View	View	View	View
SAMPLE Master Data		View	View	View
--Admissions		View	View	View
-- --Admissions - Law S...		View	View	View
-- --Admissions - Nursin...		View	View	View
--Advancement		View	View	Edit

Data Stewards - Athletics

Edit Copy

Description:

Users in this group have Manager permissions for definitions in this functional area. For convenience related functional areas.

Users (1)

[Star Athlete](#)

Permissions and Inheritance

Inheritance Rules

- New data systems inherit viewer data system permissions
- New data systems inherit viewer technical permissions
- New data systems inherit hidden research data permissions
- New functional areas inherit viewer specifications permissions
- New functional areas inherit editor definitions permissions
- New functional areas inherit viewer data quality rules permissions

Permissions

Functional Areas	Information Requests	Specifications	Definitions	Data Quality Rules
All Areas	View	View	View	View
SAMPLE Master Data		View	Edit	View
--Admissions		View	Edit	View
-- --Admissions - Law S...		View	Edit	View
-- --Admissions - Nursin...		View	Edit	View
--Advancement		View	View	View
--Athletics		View	View	Edit

Inherit Permissions

- Data Cookbook Content Manager user group
 - Review inheritance rules
 - Add AAA Thanksgiving User Group
 - Permissions are inherited

5. Improved Edit schema objects

- Primary key separated from Foreign Key designation
- Foreign key – can link to other columns in same data model
- Subsequent refresh preserves manual edits

6. Expanded Specification Import/Export

- Includes all Overview fields – previously only 50% of fields
 - Display description
 - Mapping description
 - Selection description
 - Sort description
 - Tools
 - Target Data System
 - Output Format
 - Technical Details

**Starting
Q&A**



**End of
Presentation
Section
Recording Stops**



Q&A

Submit questions in Chat and we will read it and/or unmute you.



Wrap Up



Workshop Wednesday Recordings



[Andy Berry \(Log out\)](#) [Help](#) [Recent Updates](#)



[Home](#) [Definitions](#) [Specifications](#) [Quality](#) [Data Systems](#) [Organization](#) [Community](#)

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Data Governance Resources

www.datacookbook.com/DG

Browse
previous
webinars

The screenshot shows the Data Cookbook website's 'Data Intelligence Resources' page. The header includes the Data Cookbook logo, a 'Schedule a Demo' button, and navigation links for Product, Best Practices (highlighted), Consulting, Clients & Industries, Pricing, and About Us. The main heading is 'Data Intelligence Resources', followed by a paragraph: 'IData has created a resource library of best practices in data intelligence, data governance, data catalog, and the Data Cookbook solution.' Below this are three cards: 'Recorded Public Webinars' (grey background) with a 'Learn More' button, 'Upcoming Public Webinars' (green background) with a 'Learn More' button, and 'Twitter' (dark blue background) with a 'Learn More' button.

Do you need to sign up for
the next webinars?

Data Intelligence Topics

Topic/Title	Type	Duration	Click
Data Intelligence/Governance Assessment and Planning			
• Setting Goals and Creating Your Data Intelligence Roadmap	Best Practice	30 Minutes	To View
• Assessing Your Data Governance Initiative	Best Practice	30 Minutes	To View
• Defining and Prioritizing the Scope of Your Data Governance Initiative	Best Practice	30 Minutes	To View
Building Adoption and Buy-in			
• Roles in Data Governance - Value, Responsibilities, and Accountability	Best Practice	60 Minutes	To View
• Understanding DG Perspective & Benefits to Different Stakeholders	Best Practice	60 Minutes	To View
• 5 Keys to Data Governance Success	Best Practice	60 Minutes	To View
• Making the Data Governance ROI Case in Your Organization	Best Practice	60 Minutes	To View
• Solving the Hardest Part of Replicating Data Governance from Pilot to Enterprise	Best Practice	60 Minutes	To View
• Why Do Most Data Governance Initiatives Fail?	Best Practice	60 Minutes	To View
Business Glossary			
• Business Glossary - Best Practices	Best Practice	30 Minutes	To View
• Business Glossary - Data Cookbook Features Demo	Product Demo	60 Minutes	To View
• Managing the Collisions of Definitions	Best Practice	30 Minutes	To View
• Differences Between Managing Technical and Functional Metadata	Best Practice	30 Minutes	To View
• Tips for Writing Great Business Glossary Definitions	Best Practice	30 Minutes	To View
Data Catalog and Data Systems Inventory			
• Data System Inventory - Best Practices	Best Practice	30 Minutes	To View
• Data System Inventory - Data Cookbook Features Demo	Product Demo	60 Minutes	To View
• Data Models / Data Catalog - Best Practices	Best Practice	30 Minutes	To View
• Data Models / Data Catalog - Data Cookbook Features Demo	Product Demo	60 Minutes	To View
Data Lineage			
• Data Lineage - Best Practices	Best Practice	30 Minutes	To View
• Data Lineage - Data Cookbook Features Demo	Product Demo	60 Minutes	To View
Data Policy Attributes			
• Data Policy Attributes - Best Practices	Best Practice	30 Minutes	To View

Webinars listed by topic

Data Governance Practice Webinar Series

Our previous data governance and data intelligence best practices webinar series was a tremendous success. We received a great deal of positive feedback on these webinars so we thought we would redo the series with new and updated content along with a few new topics as well. There are 19 webinars in the series with many of them now available for registration.

All these best practices webinars are on Thursdays at 2pm Eastern/11am Pacific.

These are no cost sessions so feel free to register for any that will be beneficial to you and your organization.

If you can not attend the date and time of the webinar, feel free to register and you will be sent the link to the webinar recording. After the educational portion of each webinar, we will do a quick demo of the Data Cookbook solution features that relate to that specific webinar's topic. Hope you can join us.

- Recorded Webinars
- Upcoming Webinars
- Data Governance Best Practice Series**
- Content Community

[Register for a Webinar](#)

Free Data Governance Best Practices Series Starts on July 14th.

List of Webinars

There are 19 webinars in the series and here is the list of the upcoming 10 webinars where registration is open (click on webinar to register or click [here](#) to register for multiple webinars):

- **07/14/22** [Data Intelligence, Data Governance and Data Catalog - What's It All About](#)
- **07/21/22** [Setting Goals and Creating Your Data Governance/Data Intelligence Roadmap](#)
- **07/28/22** [The Four Types of Data Stewardship Roles](#)
- **08/04/22** [Data System Inventory Best Practices](#)
- **08/11/22** [Data Catalog and Data Model Best Practices](#)
- **08/18/22** [Business Glossary Best Practices](#)
- **08/25/22** [Managing Data Policies and Policy Attributes Best Practices](#)
- **09/01/22** [Managing a Pragmatic Data Quality Program](#)
- **09/15/22** [Points of Engagement with Data Governance Content](#)
- **10/06/22** [The Amazing ROI of a Well Executed Report Request Process - Best Practices](#)

Register one at a time, or for the full series!

Future Webinars

Registration for Data Governance and Data Intelligence Best Practices Webinar Series

All these best practices webinars are on Thursdays at 2pm Eastern / 11am Pacific. These are no cost sessions so feel free to register for any that will be beneficial to you and your organization.

Email*

First name*

Last name*

Click to Register for the Following Best Practices Webinars

- 07/14/22 Data Intelligence, Data Governance and Data Catalog - What's It About
- 07/21/22 Setting Goals and Creating Your Data Governance / Data Intelligence Roadmap
- 07/28/22 The Four Types of Data Stewardship Roles
- 08/04/22 Data System Inventory Best Practices
- 08/11/22 Data Catalog and Data Model Best Practices
- 08/18/22 Business Glossary Best Practices
- 08/25/22 Managing Data Policies and Policy Attributes Best Practices

Want to Talk about Governance or Cookbook?

Schedule a Free One-Hour
Data Governance Support Consultation

Get feedback or advice
Data governance Initiatives
Data Cookbook usage

Complete the post-workshop survey or email
support@datacookbook.com



We Want to Hear From You!

- Please fill out the workshop survey
 - Would you like a copy of the presentation?
 - How would you rate the webinar in general?
 - What topics would you like IData to focus on in future webinars?
 - Would you like to schedule a Data Governance support consultation?

- Need something else?
email support@datacookbook.com



Thank You!



**data
cookbook**

