

How to use the Quality Rule Module

This session reviews the features of the Quality Rule catalog and the features of quality rules embedded within definitions. Use cases include rules that measure the accuracy or completeness of data and rules that monitor critical business processes.

Workshop Wednesday #19

April 28, 2021

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

Use the Chat Box for questions

Welcome

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

- **Brenda Reeb**
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 - IData, Director of Marketing
 - jwalery@idatainc.com



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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.
Office Hours	Schedule a no cost 30 minute call with a Data Cookbook expert. For APIs, ODBC views, Integration Suite, or other technical topics, schedule here . For Workflow, Definitions, Specifications, Quality, Data Governance or other general use topics, schedule here .
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	2/22/2021	Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.
Administrator's Guide	11/16/2020	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	03/08/2021	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.

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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	44	about 2 months ago In: Linking from Informer to the Cookbook By: Matt Rud - Lesley University	Watch

Workshop Wednesday Agenda

- What is a quality rule?
- Fields and Features
- 2 ways to create a rule
- Q&A

What is a Quality Rule?

1. A measure of the completeness or the accuracy of a data element.
2. A method to enforce business rules.
 - A. Gender can't be null.
 - B. Phone number must include area code
 - C. Graduate Forwarding Address Less than 90 days old
 - D. Maximum Credits

Quality Rule

QUALITY RULE

[Comment \(0 comments\)](#)

Athlete gender can't be null

[Add to my watch list](#)

Drafting Version 1 ⚠️ 1

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Submit

Reject

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Description:

Per NCAA rules, athletes must report biological gender. The My Student Athlete System is the source of record for all gender reporting for athletics.

RULE SEVERITY: [Normal](#)

VALIDATION: [i](#)

Type: Required

Allow Nulls: [i](#) No

Allow Blank Strings: [i](#) No

[FUNCTIONAL AREAS](#) [i](#)

Athletics

[RELATED DEFINITIONS](#) (0) [i](#)

No Related Definitions

[QUALITY ISSUES](#) (1) [i](#)

35: Threshold exceeded for Athlete gender can't be null

Delete this quality rule

Technical Information [i](#)

Data System: [i](#) [2. Primary Systems](#) » [My Student Athlete System](#)

Data Quality Assessment: [i](#) **LOW**

Column: [i](#) [athlete_gender](#)

Scope Query: [i](#)

Retrieve all athletes in current term.

Reporting Columns: [i](#)

[i](#) [student_name](#)

Threshold: [i](#) 1 (count)

Frequency: [i](#) manual

Pause when a quality issue is in progress?: [i](#) No

Last run: [i](#) n/a

Enabled for integration: [i](#) No

Assessments: [i](#)

Date/User	Assessment Notes	Reported Issues
05/28/2019 12:00 AM Star Athlete	40.0% 4 failed out of 10	Always high failures at start of new academic year. Threshold exceeded for Athlete gender can't be null

Fields and Features –Demo

- Name and Description
- Functional Area
- Relate to a Definition
- Quality Issues

QUALITY RULE

Athlete gender can't be null

[Comment](#) (0 comments)
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[Edit](#)

Description:
Per NCAA rules, athletes must report biological gender. The My Student Athlete System is the source of record for all gender reporting for athletics.

RULE SEVERITY: [Normal](#)

VALIDATION: ⓘ

Type: [Required](#)

Allow Nulls: ⓘ [No](#)

Allow Blank Strings: ⓘ [No](#)

FUNCTIONAL AREAS ⓘ [Athletics](#)

RELATED DEFINITIONS (0) ⓘ
No Related Definitions

QUALITY ISSUES (1) ⓘ
[35: Threshold exceeded for Athlete gender can't be null](#)

[Delete this quality rule](#)

Fields and Features –Demo

- Data System and Schema Objects
- Threshold
- Reference data

Technical Information ⓘ

Data System: ⓘ  2. Primary Systems » [My Student Athlete System](#)

Data Quality Assessment: ⓘ **LOW**

Column: ⓘ [athlete_gender](#)

Scope Query: ⓘ

Retrieve all athletes in current term.

Reporting Columns: ⓘ

ⓘ [student_name](#)

Threshold: ⓘ 1 (count)

Frequency: ⓘ manual

Pause when a quality issue is in progress?: ⓘ No

Last run: ⓘ n/a

Enabled for integration: ⓘ No

Assessments: ⓘ

Date/User	Assessment Notes	Reported Issues
05/28/2019 12:00 AM Star Athlete	40.0% 4 failed out of 10	Always high failures at start of new academic year. Threshold exceeded for Athlete_gender can't be null

Document an Assessment

Quality Rules catalog

Quality Rules ?

Search:

Sort by: Display:

Filter by:

Displaying all 20 quality rules

Expand Technical Quality Rules?

Admit Code Cannot be Null

No Approved Versions

Version **1** of **1**
Created by [Lettie Mein](#) 10/20/2020
Modified by [Lettie Mein](#) 10/20/2020

Technical Information:

[+](#) [1. Enterprise Systems](#) > [Ellucian Banner ERP System](#) (custom, Assessment Failures: 17.62%)

RULE SEVERITY:
VALIDATION TYPE: **Required**
FUNCTIONAL AREAS:
• [Admissions](#)

Advancement rating code must be valid for active rating types

Version **5** of **5**
Created by [Demo User \(Admin\)](#) 03/17/2021
Approved

Advancement current rating type code must be valid for active rating types

Technical Information:

[+](#) [1. Enterprise Systems](#) > [Ellucian Banner ERP System](#) (custom, Assessment Failures: 64.86%)

RULE SEVERITY:
VALIDATION TYPE: **Valid Value**
FUNCTIONAL AREAS:
• [Advancement](#)

Athlete Emergency Phone Number Must Include Area Code

Version **2** of **2**
Created by [Star Athlete](#) 10/11/2020
Approved

2 Ways to Create

- Create a Rule
- Embed within a definition

Create a Quality Rule

New Quality Rule

*Name ⓘ

Description ⓘ

☰ ☰ ☰ ☰ ☰ ☰ Size - **A** **B** *I* U **S**  

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

Rule severity ⓘ

Assign an optional rule severity:

*Validation ⓘ

Validation type:

Technical Information ⓘ

Data System: ⓘ ⓘ [Browse Data System](#)

DRAG AND DROP COLUMN FROM SCHEMA BROWSER HERE OR ENTER MANUALLY: ⓘ

SCHEMA: ⓘ

TABLE/VIEW: ⓘ

Embed

DEFINITION

Appointment Begin Date

Comment (1 comment)

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Approved Version 2 [New version](#)

[Show workflow](#)

Functional Definition:

The start date of an [appointment](#)

Other Information: ⓘ

SOURCE OF DEFINITION: ⓘ None specified

CLASSIFICATION: ⓘ [Internal](#)

Quality Attributes ⓘ

[Data Type](#) ⓘ

RULE SEVERITY: ⓘ Normal

DATA TYPES: date

Approved

Technical Definitions ⓘ

No technical definitions defined.

FUNCTIONAL AREAS ⓘ

Human Resources

DEFINITION

WOF
Definitic

appointment end date

Comment (0 comments)

☆ Add to my watch list

Approved Version 1 [New version](#)

[Show workflow](#)

MOD
Data Ste

Functional Definition:

SYN
No Syno

The end date of an [appointment](#).

TAG

FACULT

Other Information: ⓘ

SOURCE OF DEFINITION: ⓘ None specified

CLASSIFICATION: ⓘ [Internal](#)

ATT.

REL

REL
appoint

Quality Attributes ⓘ No quality attributes defined

Technical Definitions ⓘ

No technical definitions defined.

FUNCTIONAL AREAS ⓘ

Human Resources

WORKFLOW ⓘ

Definition Approval

MODERATORS ⓘ

Data Stewards - Human Resources

SYNONYMS ⓘ

No Synonyms

TAGS ⓘ (USAGE TIPS)

FACULTY

ATTACHMENTS ⓘ

RELATED SPECIFICATIONS (0) ⓘ

RELATED DEFINITIONS (1) ⓘ

Advanced – Rule to adopt Ref Data

QUALITY RULE

Advancement rating code must be valid for active rating types

Data Quality Assessment: Ellucian Banner ERP System: **LOW**

Comment (0 comments)

Add to my watch list

Approved Version 5 [New version](#)

Description:

Advancement current rating type code must be valid for active rating type

RULE SEVERITY:

VALIDATION:

Type:

Allow Nulls:

Allow Blank Strings:

[Donor Prospect Rating](#)

Code	Description
EX	Excellent
GD	Good
I1	Will Give
I2	Probably Give

Technical Information

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

Data Quality Assessment: **LOW**

Column: [AMRPRRT_RATE_CODE](#)

Scope Query:

```
(AMRPRRT_RATE_EFF_TO_DATE IS NULL) OR  
(TRUNC(AMRPRRT_RATE_EFF_TO_DATE) > TRUNC(SYSDATE))
```

Reporting Columns:

[AMRPRRT_PIDM](#)
[AMRPRRT_RATE_CODE](#)
[AMRPRRT_RTGT_CODE](#)
[AMRPRRT_ACTIVITY_DATE](#)
[AMRPRRT_USER](#)
[AMRPRRT_RATE_EFF_FROM_DATE](#)
[AMRPRRT_RATE_EFF_TO_DATE](#)

Threshold: 0 (count)

Frequency: custom

Pause when a quality issue is in progress?: No

Last run: 03/24/2021 2:30 PM

Enabled for integration: Yes

Assessments:

Date/User	Assessment	Notes	Reported Issues
03/24/2021 2:30 PM API Integration	64.86% 96 failed out of 148		Threshold exceeded for "Advancement rating code must be valid for active rating types" for Ellucian Banner ERP System

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Summary

- Use Quality Rules:
 - To know the relative quality of data across systems
 - To demonstrate/market that you are measuring quality
 - To standardize how you discover, resolve, cleanse data
- Two approaches:
 - Monitor accuracy and completeness of data
 - Support business process
- It's ok to skip the technical

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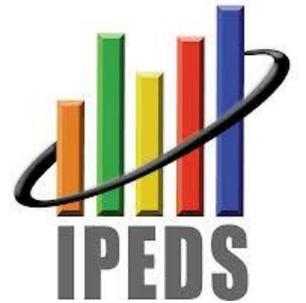
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IData News	Browse the latest public news and announcements from the Data Cookbook website
Twitter	Follow us on Twitter!
IData YouTube Channel	Find content recorded by IData experts on Data Governance topics

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

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Data Request Process - 3 Ways (35:53)

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Specification Approval Workflow (42:41)

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How to Import Definitions (37:24)

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Quality Rule Workflows (48:03)

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Perform Workflow Tasks in Bulk (29:43)

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All About Tags, Synonyms and Attachments (33:38)

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