

# Making the Most of the Designated Requester Role for Better Customer Service Workflows in the Data Cookbook



## **Workshop Wednesday #22**

June 29, 2022

# Logistics

**60 minute  
Session**



**Last 30 minutes  
is discussion  
and will NOT  
be recorded**

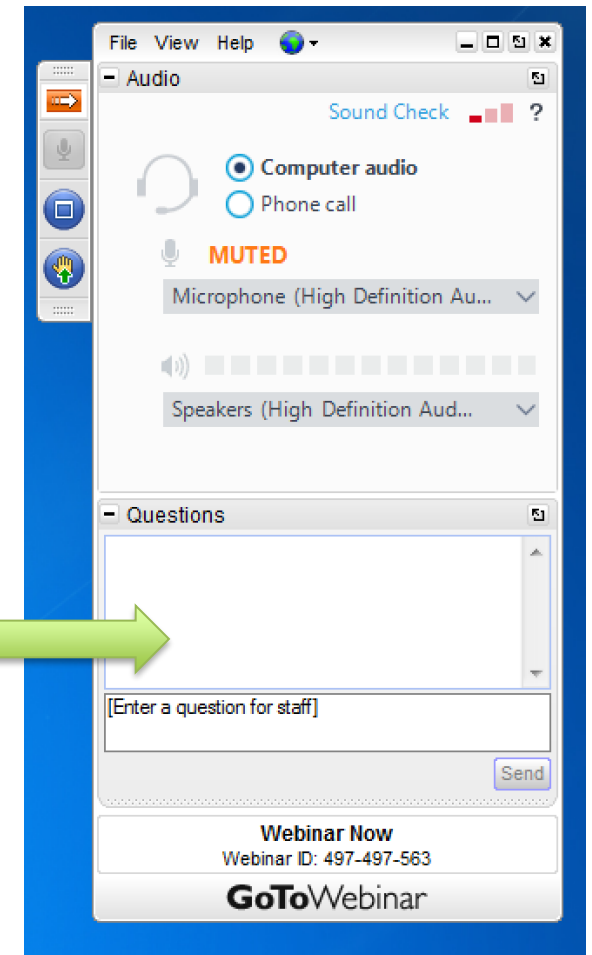


**1st 30 minutes  
is presentation  
and will  
be recorded**



# Logistics

- If you are attending the live session, you will receive the link to the recording within 1-2 days (after closed captioning is added).
- Meeting software – GoToWebinar
  - Everyone starts off muted. We will unmute you individually as needed for questions in the second half.
  - Questions? Enter them in the chat box
- Workshop Survey
  - Please finish the survey at the end



# Welcome

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



- **Brenda Reeb**

- IData, Data Management Consultant
- breeb@idatainc.com



- **Brian Parish**

- IData, CEO and Founder
- bparish@idatainc.com



- **Jim Walery**

- IData, Director of Marketing
- jwalery@idatainc.com

# Training Resources

[Andy Berry \(Log out\)](#) [Help](#) [Recent Updates](#)[Home](#)[Definitions](#)[Specifications](#)[Quality](#)[Data Systems](#)[Organization](#)[Community](#)

## Help

### Training Resources

Resource	Description
<a href="#">Just-in-Time-Training Videos</a>	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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<a href="#">Recorded Public Videos</a>	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

- What is the Designated Requester Role?
  - Version Creator vs. Designated Requester
- Background and Context
  - Importance of a customer service approach to Data Intelligence
  - Designing customer service workflows with the requester in mind
- Applying the Designated Requester to your workflows
  - Feature Walk-through
- Discussion

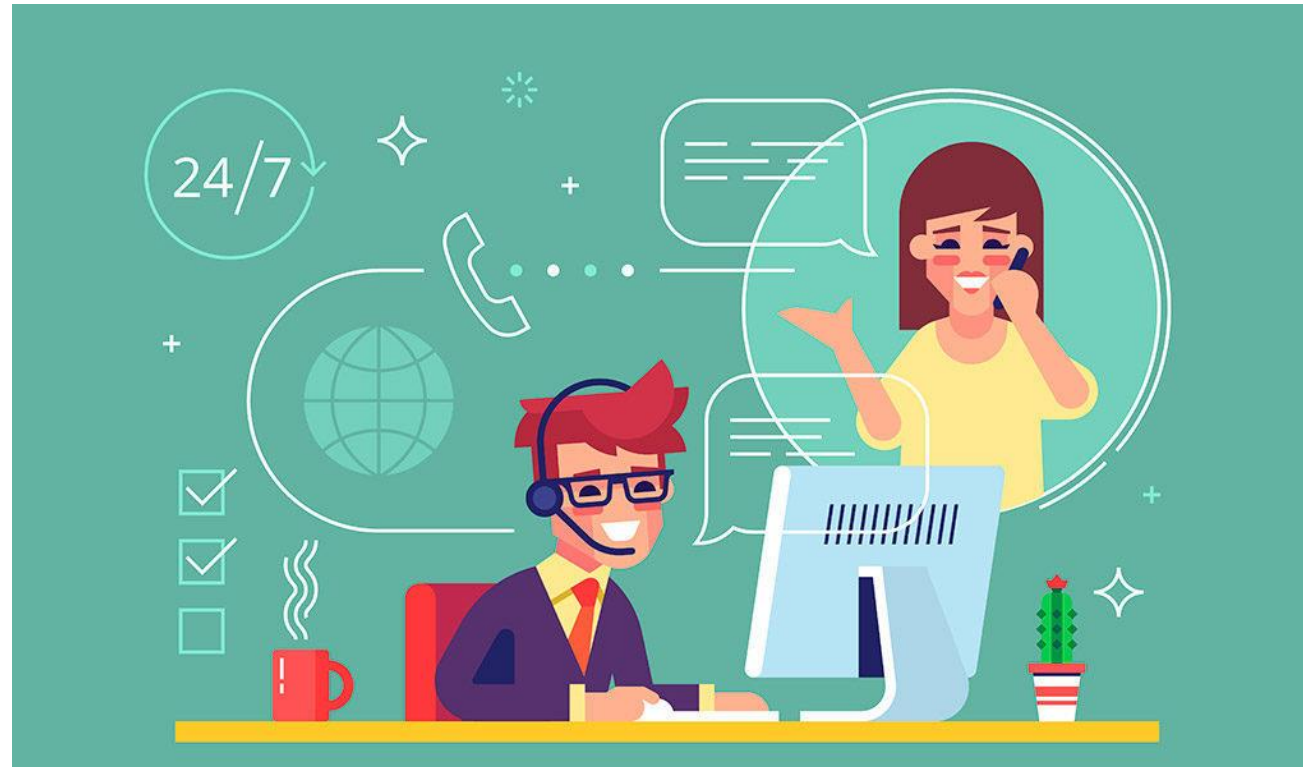


# What is the Designated Requester Role?

- What is the Designated Requester Role?
  - Version Creator vs. Designated Requester

# Background and Context

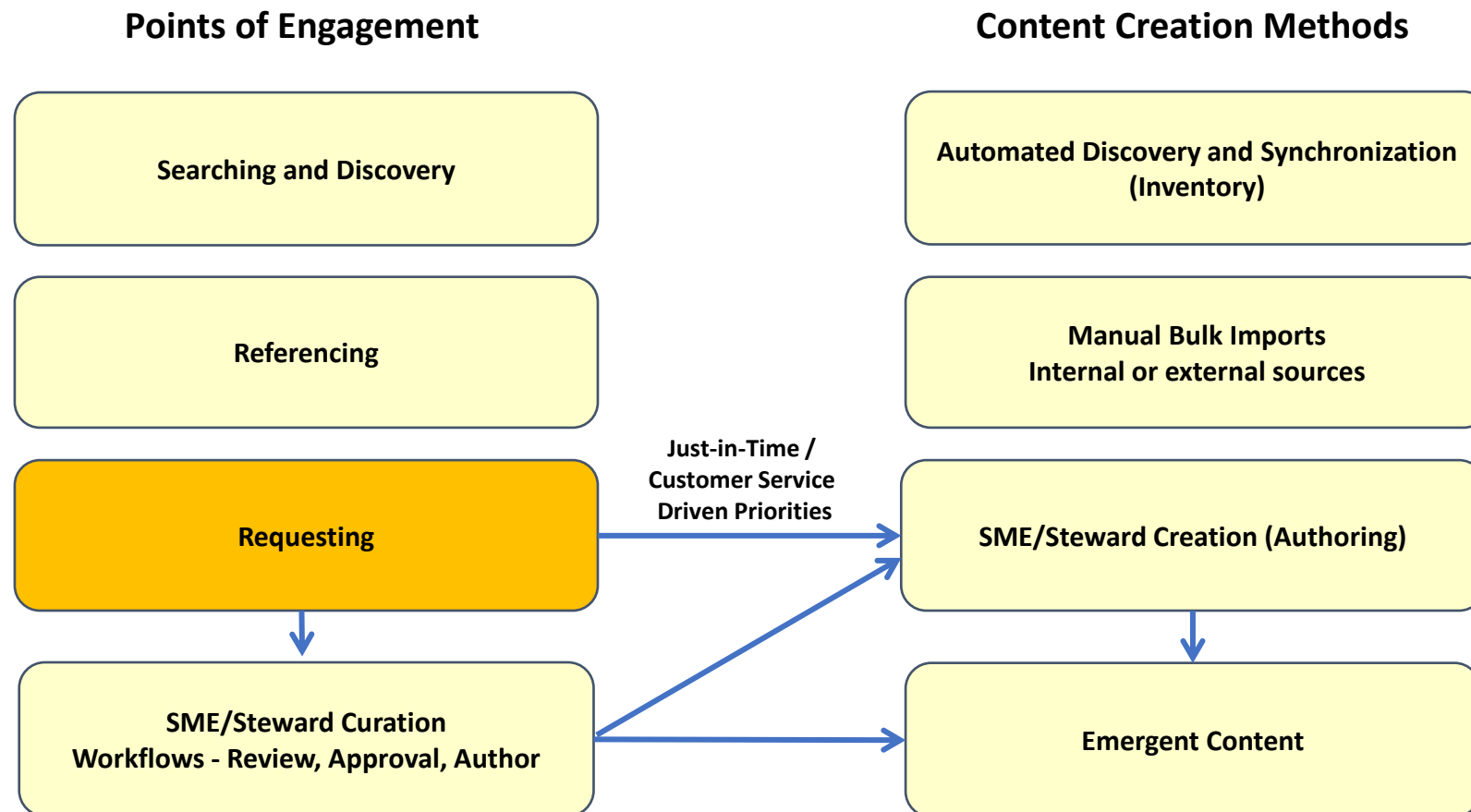
- Importance of a customer service approach to Data Intelligence





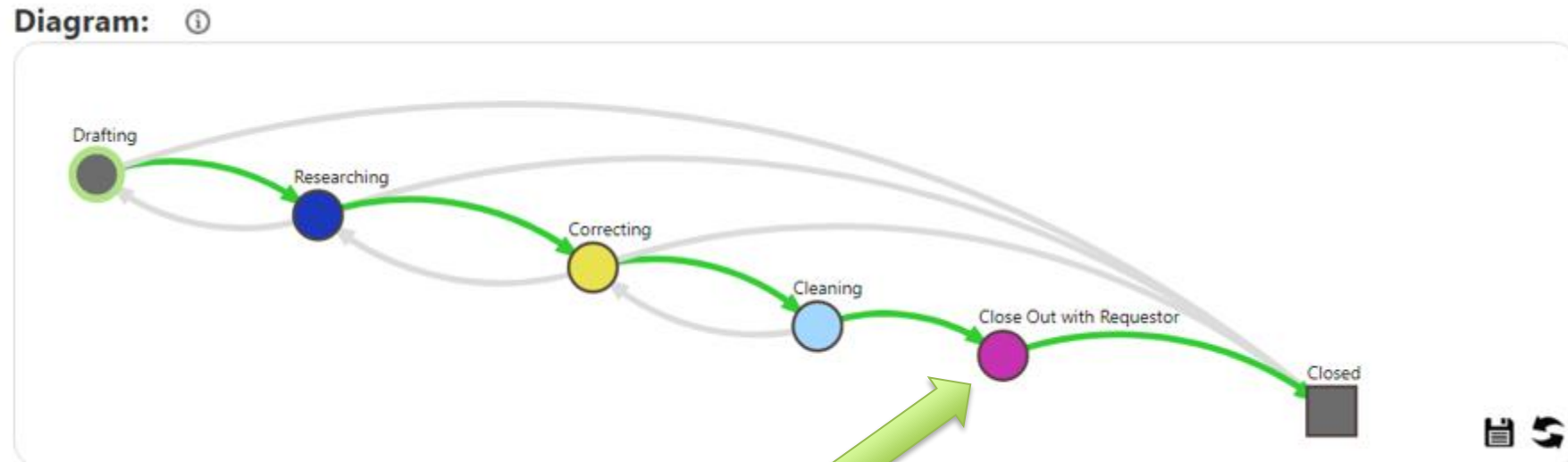
# Background and Context

- Importance of a customer service approach to Data Intelligence



# Background and Context

- Designing customer service workflows with the requester in mind

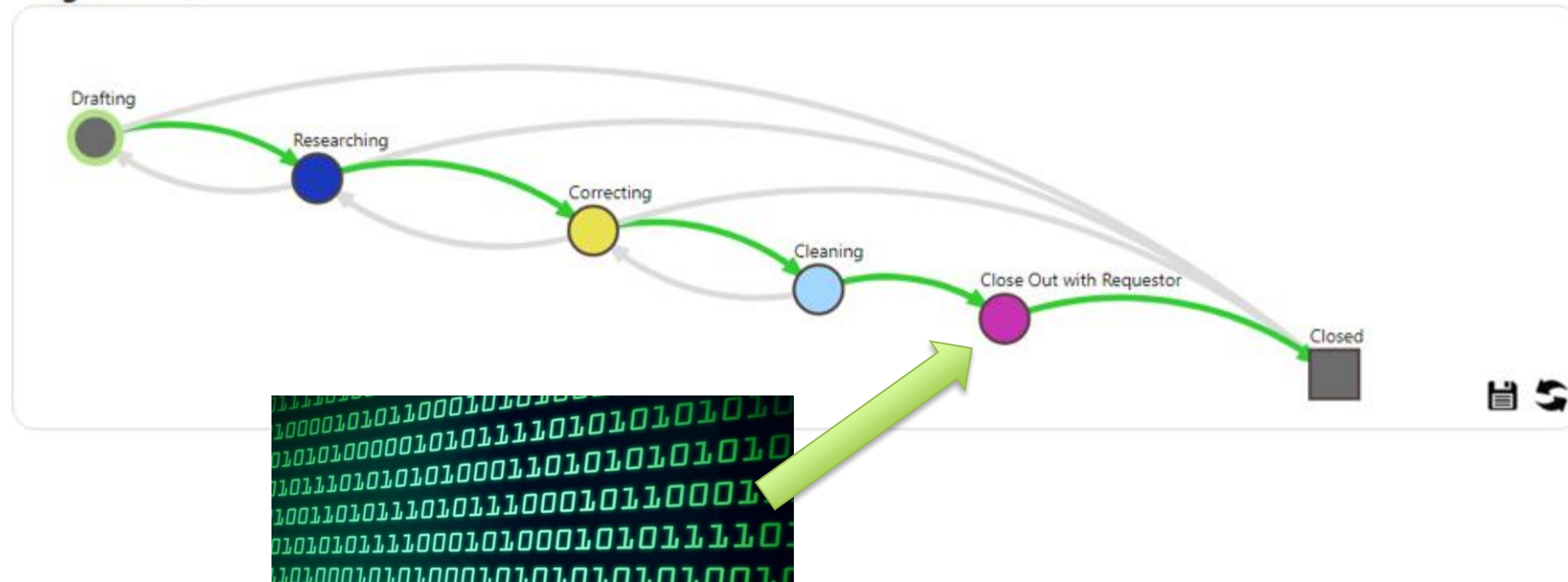


Ida Asker

# Background and Context

- Need to have different approach than version creator
  - Proxy-users creating content
  - Bulk-Loads
  - Automated creation (integration)

Diagram: ⓘ



# Feature Walk-through

- Applying the Designated Requester to your workflows

# Origination Methods

- Origination Methods
  - Manual
  - Batch
  - Integration
- Origination Method Types: Manual
- Origination Method Types: Automatic

# Assigning Designated Requestor

- Manual creation/change defaults from version creator
- Manually assign in edit mode
- Assign as part of bulk import or API call
- Automatically assign using **Role User Assignment Mappings**

# Workflow Example

**Workflow Definition Type:** ⓘ  
Quality Issue Resolution ▼

## Quality Issue Resolution - Auto Created

Type: Quality Issue Resolution | Status: **active** | Version: 1

This is the Quality issue resolution workflow for automatically created items.

**STAGES:**  
Drafting, Researching, Correcting, Cleaning

**CONDITIONS:**  
**Origination Method Type is automatic**

## Quality Issue Resolution - Manual Created

Type: Quality Issue Resolution | Status: **active** | Version: 2

This is a default Quality issue resolution workflow when the issue is created by a user. This includes a final step for the data steward to confirm the requestor agrees to resolution before closing.

**STAGES:**  
Drafting, Researching, Correcting, Cleaning, Close Out with Requestor

# Quality Issue Resolution - Auto Created

[Back to All Workflows](#)


Type: Quality Issue Resolution | Status: **active** | Version: 1 [Active Objects \(3\)](#)

Edit Workflow

Create a New Version

Suspend

Copy

Print 

## Description:

This is the Quality issue resolution workflow for automatically created items.

## Conditions:

Origination Method Type is automatic

## Workflow-level Automatic Named Role Assignments:

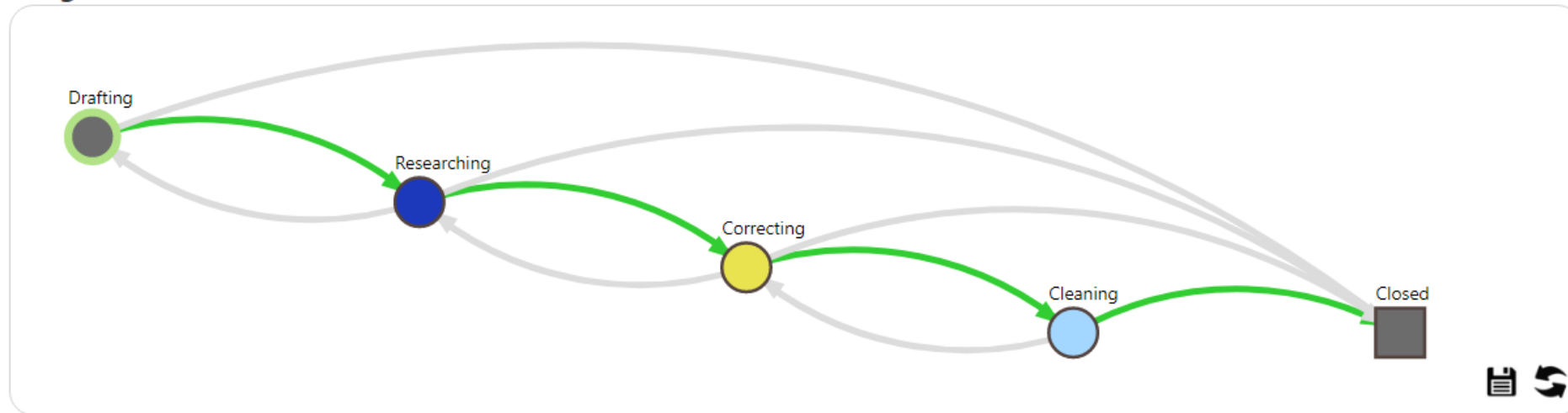
Named Role 

Designated Requester

User Mapping 

[Designated Requester Assignment By Data System](#)

## Diagram:





# Quality Issue Resolution - Manual Created

[Back to All Workflows](#)


Type: Quality Issue Resolution | Status: **active** | Version: 2 [Active Objects \(3\)](#)

Edit Workflow

Create a New Version

Suspend

Copy

Print 

## Description:

This is a default Quality issue resolution workflow when the issue is created by a user. This includes a final step for the data steward to confirm the requestor agrees to resolution before closing.

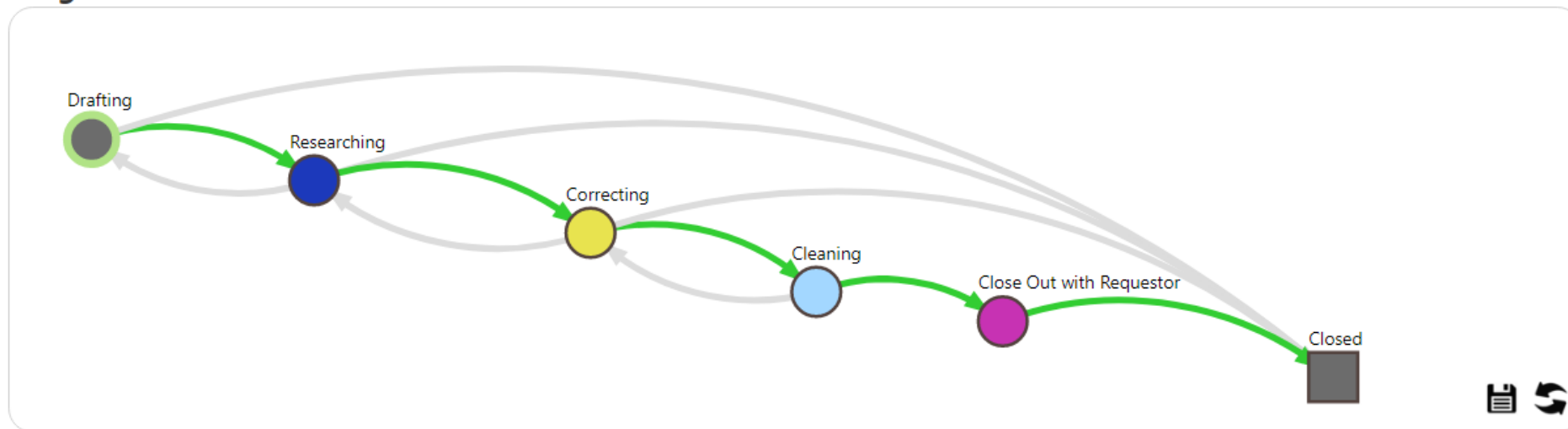
## Conditions:

None

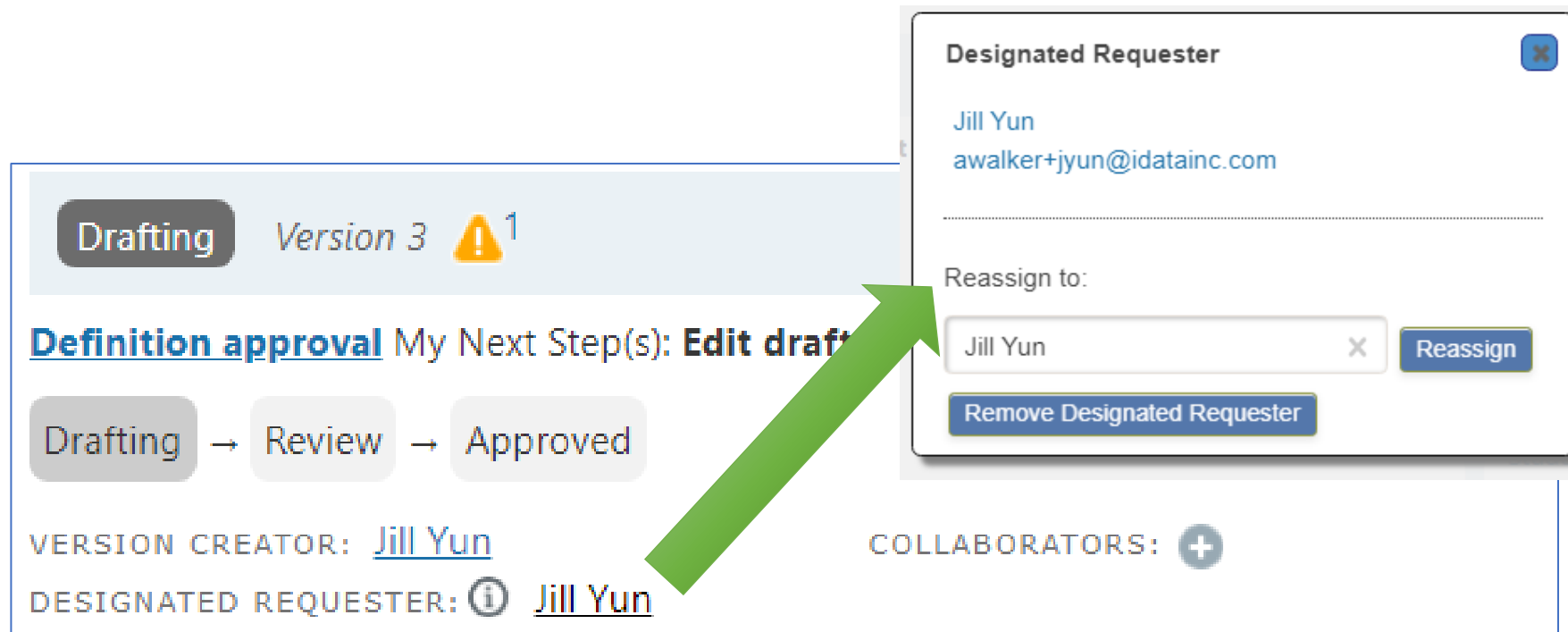
## Workflow-level Automatic Named Role Assignments:

None defined


## Diagram:



# Manual Addition




The image shows a software interface with a status bar and a modal window. The status bar at the top left indicates the current state is 'Drafting' (Version 3) with a warning icon and a superscript '1'. Below this, it says 'Definition approval' and 'My Next Step(s): Edit draft'. A progress bar shows 'Drafting' as the active step, followed by 'Review' and 'Approved'. At the bottom left, it lists 'VERSION CREATOR: Jill Yun' and 'DESIGNATED REQUESTER: Jill Yun' with an information icon. On the right, a modal window titled 'Designated Requester' is open, showing the name 'Jill Yun' and email 'awalker+jyun@idatainc.com'. It has a 'Reassign to:' section with a dropdown menu currently showing 'Jill Yun' and a 'Reassign' button. There is also a 'Remove Designated Requester' button. A large green arrow points from the 'Drafting' status in the main interface to the 'Designated Requester' modal.


**Drafting** Version 3 <sup>1</sup>

**Definition approval** My Next Step(s): **Edit draft**

Drafting → Review → Approved



VERSION CREATOR: [Jill Yun](#)


DESIGNATED REQUESTER:  [Jill Yun](#)

**Designated Requester** 


Jill Yun  
awalker+jyun@idatainc.com

Reassign to:

Jill Yun  



# Role User Assignment Mappings

Role by Functional Area <span>Edit</span>		<a href="#">Back to User Mappings</a>
<b>Description:</b> Maps individuals to specific functional areas		
<b>Users:</b> <b>Default Mapping User:</b> <a href="#">Ailene Program</a>		
Functional Area	User 	
Main Organization	<a href="#">Ailene Program</a>	
Financial Management	<a href="#">Marci Money</a>	
-- Banking	<a href="#">Marci Money</a>	
Information Technology	<a href="#">Joe Gunchy</a>	
-- Development	<a href="#">Ailene Program</a>	
-- Documentation	<a href="#">Ed Itor</a>	
-- Quality Assurance	<i>Rolls up to parent or default (Joe Gunchy)</i>	
-- Systems Management	<a href="#">Seth Curity</a>	
Resource Management	<a href="#">Holly R. Source</a>	
-- Compliance	<a href="#">Holly R. Source</a>	
-- Demographics	<a href="#">Holly R. Source</a>	

# Thank You

**Starting  
Discussion**



**End of  
Presentation  
Section  
Recording Stops**



# Discussion

- Any thoughts or questions?
- Put your question in the chat and we will read it and/or unmute you.



# Wrapping Up



# News Updates

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## News, Updates, & Social Media

Resource	Description
<a href="#">Data Cookbook News</a>	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.
<a href="#">IData News</a>	Browse the latest public news and announcements from the Data Cookbook website
<a href="#">Twitter</a>	Follow us on Twitter!
<a href="#">IData YouTube Channel</a>	Find content recorded by IData experts on Data Governance topics

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## Additional Resources

Resource	Description
<a href="#">Data Cookbook Forums</a>	Browse all the Data Cookbook Community forums.
<a href="#">Data Insights Blog</a>	See the latest blog postings from our staff on various subjects including Data Cookbook and Data Governance

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# 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](http://www.datacookbook.com/DG)

Browse  
previous  
webinars

**data cookbook** [Schedule a Demo](#) [Product](#) [Best Practices](#) [Consulting](#) [Clients & Industries](#) [Pricing](#) [About Us](#)

## Data Intelligence Resources

IData has created a resource library of best practices in data intelligence, data governance, data catalog, and the Data Cookbook solution.

### Recorded Public Webinars

Over 45 recorded webinars on various Data Cookbook and Data Governance related topics

[Learn More](#)

### Upcoming Public Webinars

View the upcoming Data Cookbook and Data Governance related webinars

[Learn More](#)

### Twitter

Follow us on Twitter! - Stay up to date on the latest happenings regarding IData, the Data Cookbook and data governance

[Learn More](#)

Do you need to sign up for  
the next webinars?

## Data Intelligence Topics

### Topic/Title

#### Data Intelligence/Governance Assessment and Planning

- Setting Goals and Creating Your Data Intelligence Roadmap
- Assessing Your Data Governance Initiative
- Defining and Prioritizing the Scope of Your Data Governance Initiative

#### Building Adoption and Buy-in

- Roles in Data Governance - Value, Responsibilities
- Understanding DG Perspective & Benefits to Different Stakeholders
- 5 Keys to Data Governance Success
- Making the Data Governance ROI Case in Your Organization
- Solving the Hardest Part of Repetitive Data Governance
- Why Do Most Data Governance Initiatives Fail?

#### Business Glossary

- Business Glossary - Best Practices
- Business Glossary - Data Cookbook Features Demo
- Managing the Collisions of Definitions
- Differences Between Managing Technical and Functional Metadata
- Tips for Writing Great Business Glossary Definitions

#### Data Catalog and Data Systems Inventory

- Data System Inventory - Best Practices
- Data System Inventory - Data Cookbook Features Demo
- Data Models / Data Catalog - Best Practices
- Data Models / Data Catalog - Data Cookbook Features Demo

#### Data Lineage

- Data Lineage - Best Practices
- Data Lineage - Data Cookbook Features Demo

#### Data Policy Attributes

- Data Policy Attributes - Best Practices

### Type

Best Practice  
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### Duration

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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 14<sup>th</sup>.**

## 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](#)

[Future Webinars](#)

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

## 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, advice, and support on  
your data governance initiatives or  
Data Cookbook use.**

**Respond to the post-workshop survey for follow-up  
or email [support@datacookbook.com](mailto: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](mailto:support@datacookbook.com)



# Thank You!



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cookbook®**