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

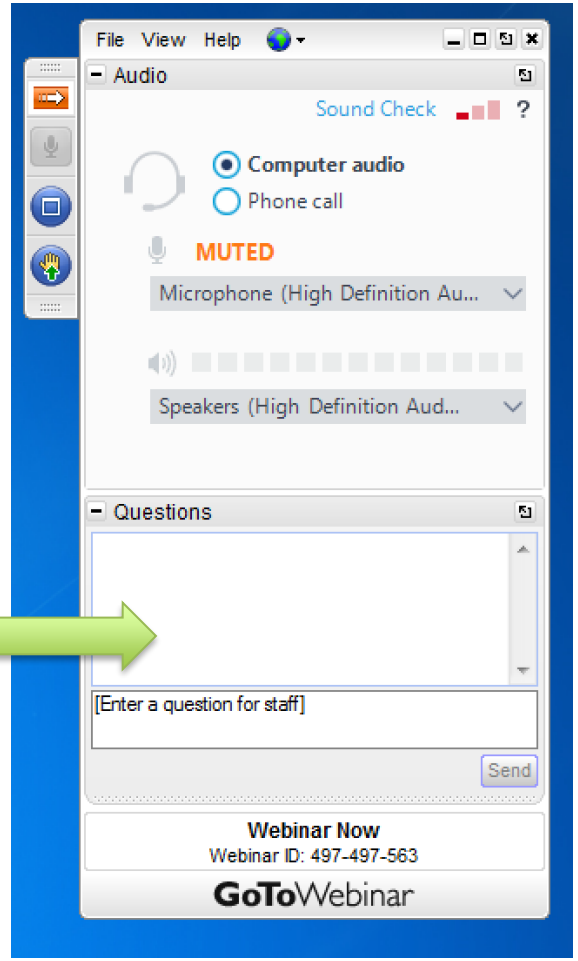
Last 30 minutes is discussion and will NOT be recorded

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

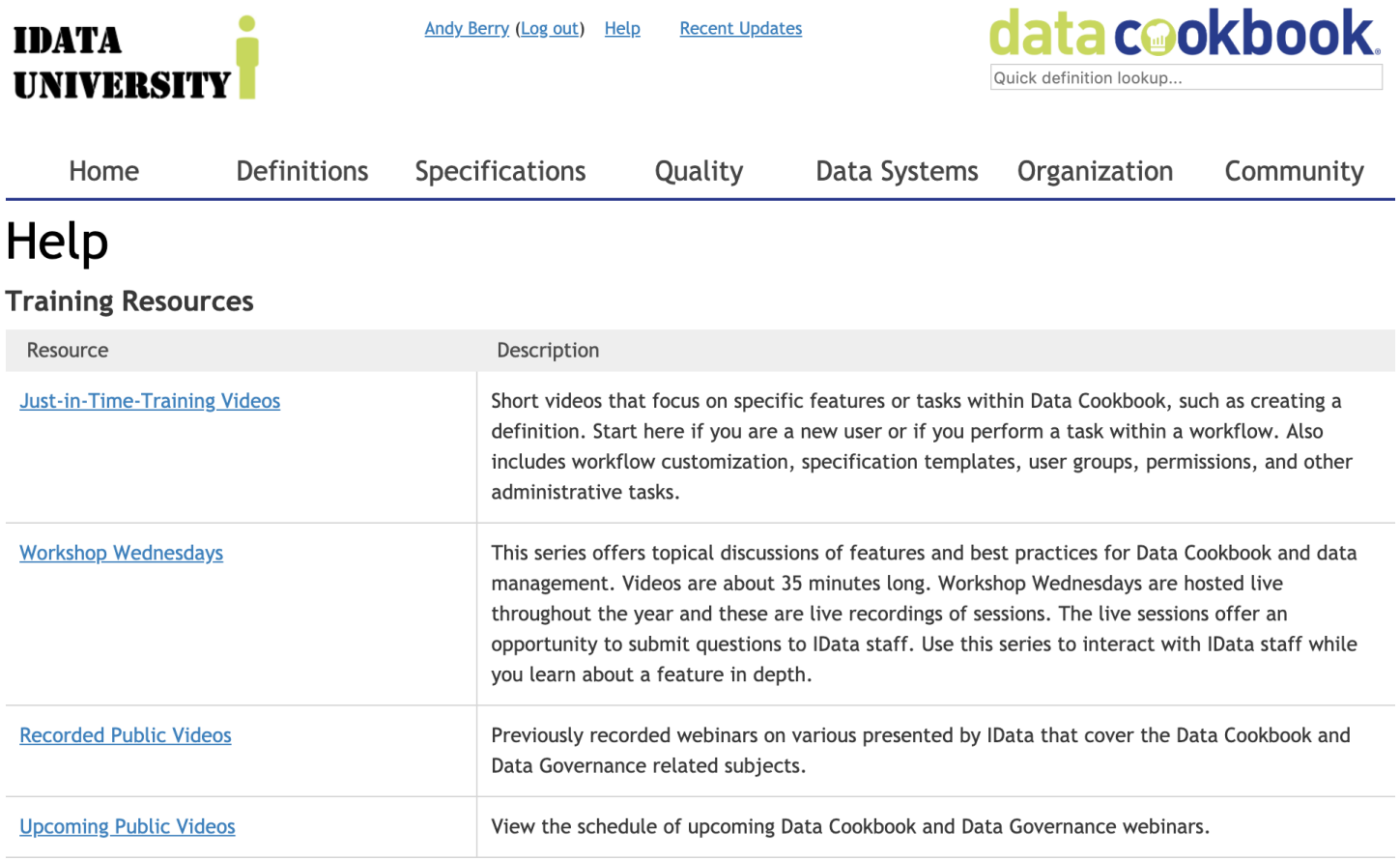
Say Hello in Chat – institution, number of people, questions you want answered today

- **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



Workshop Wednesday Agenda

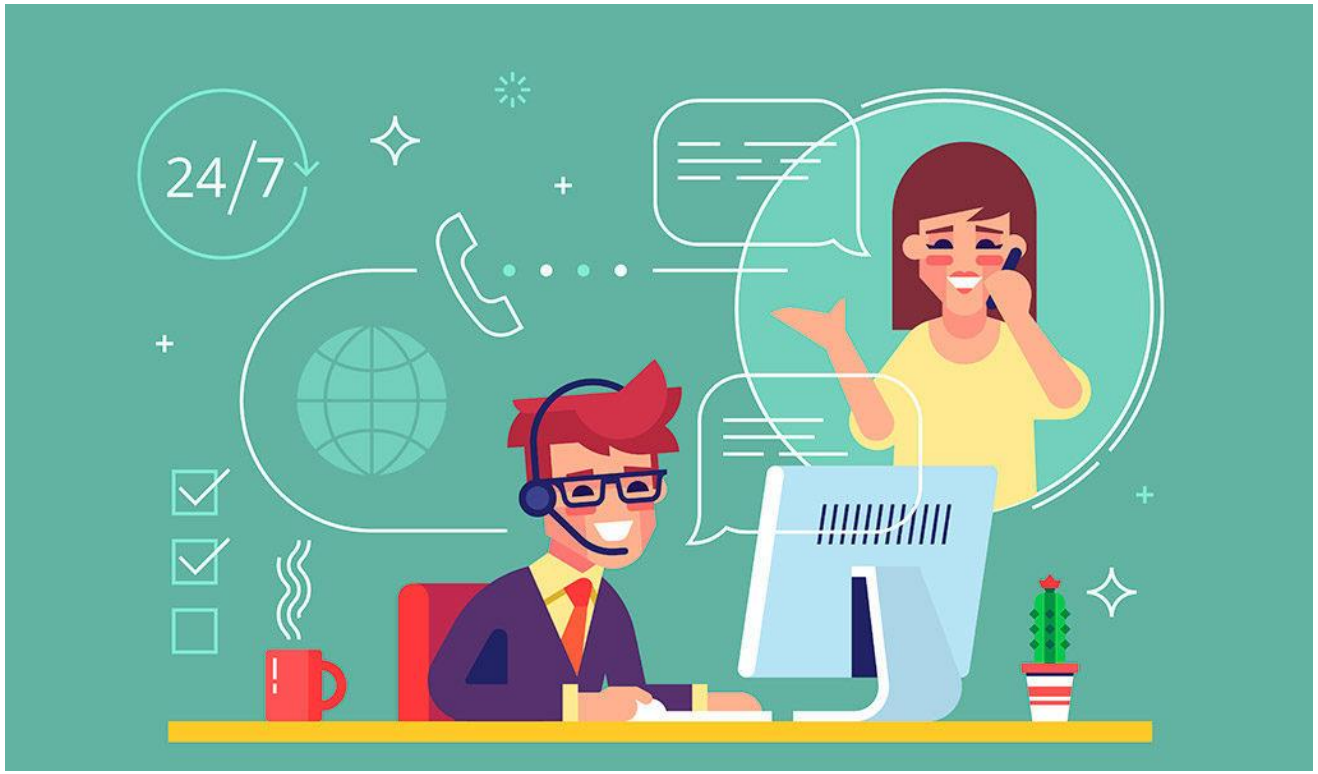
- What is the Designated Requester Role?
  - Version Creator vs. Designated Requester
- Background and Context
  - Importance of a customer service approach to Data Intelligence
  - Designing customer service workflows with the requester in mind
- Applying the Designated Requester to your workflows
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

What is the Designated Requester Role?

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

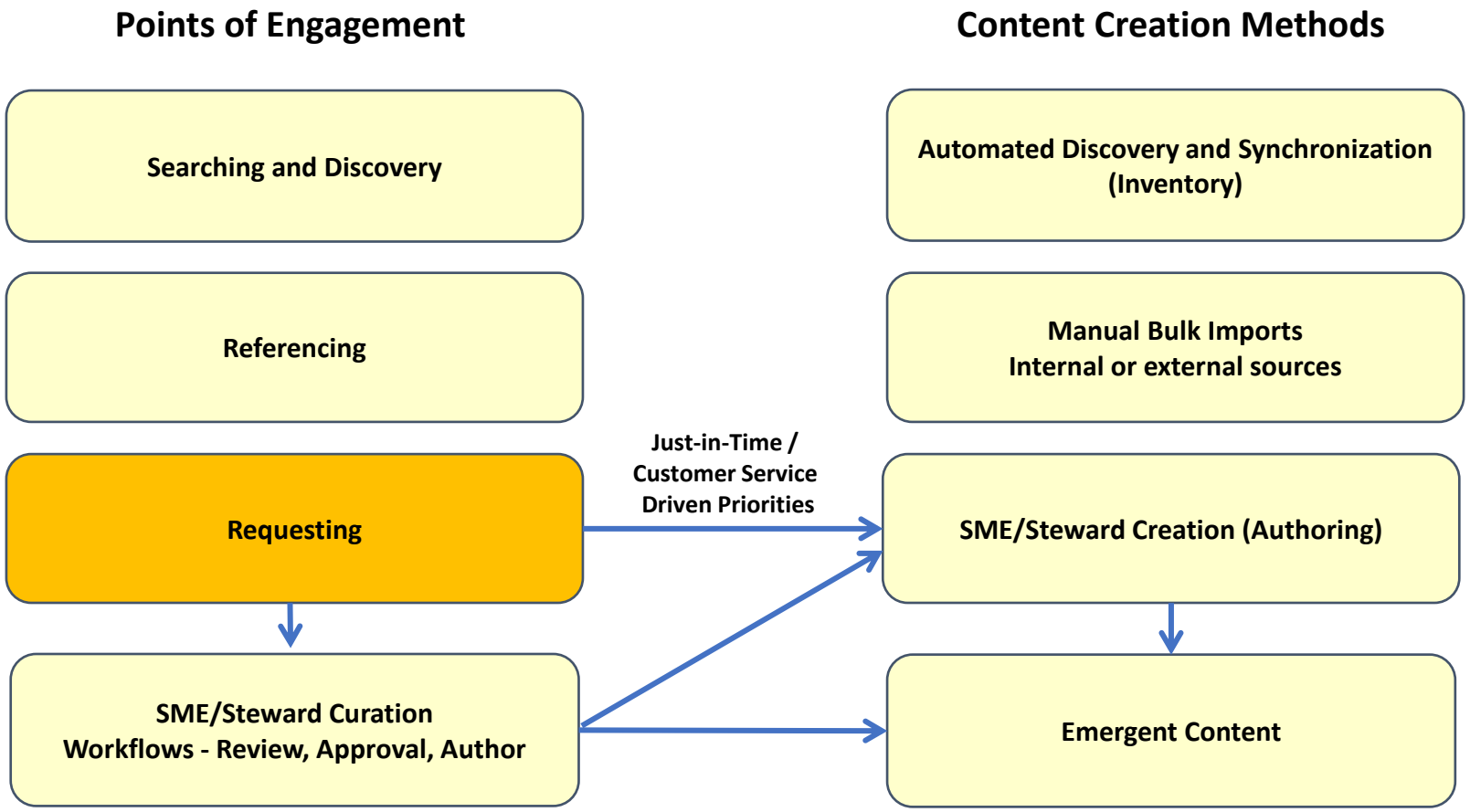
Background and Context

- Importance of a customer service approach to Data Intelligence



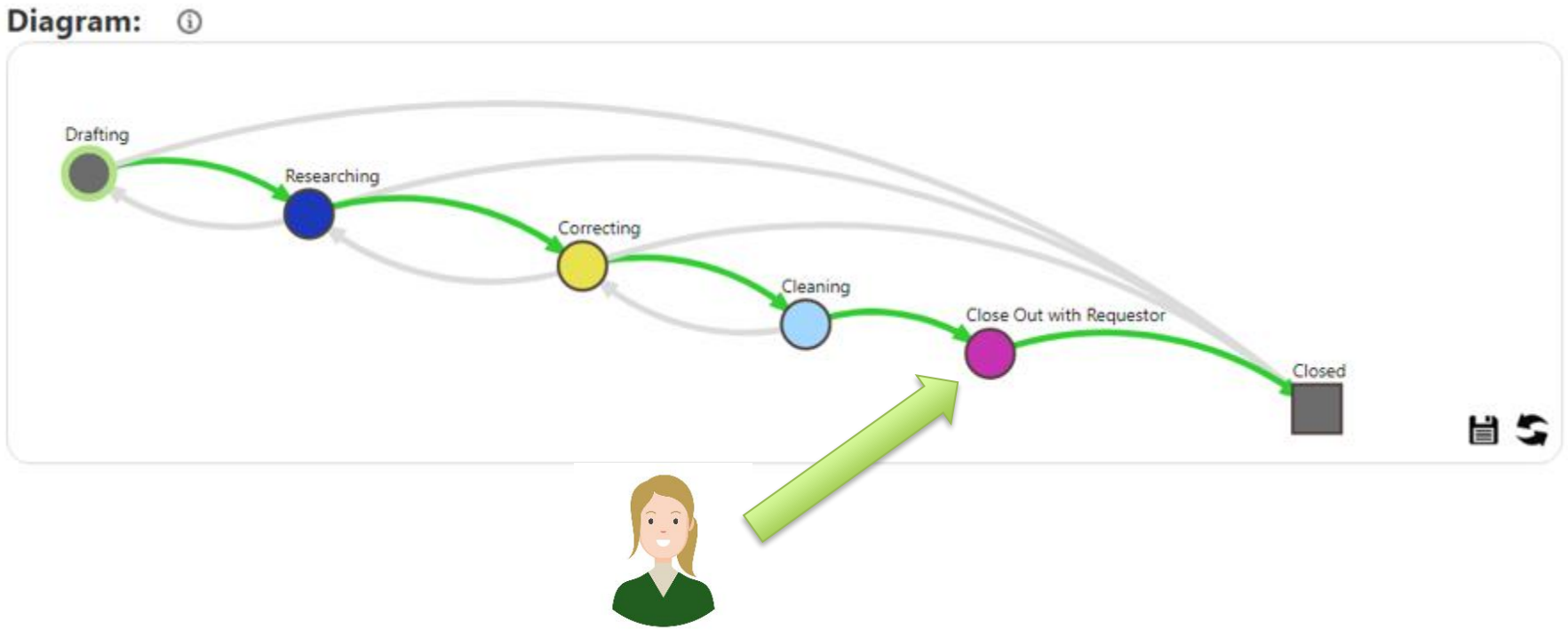
Background and Context

- Importance of a customer service approach to Data Intelligence



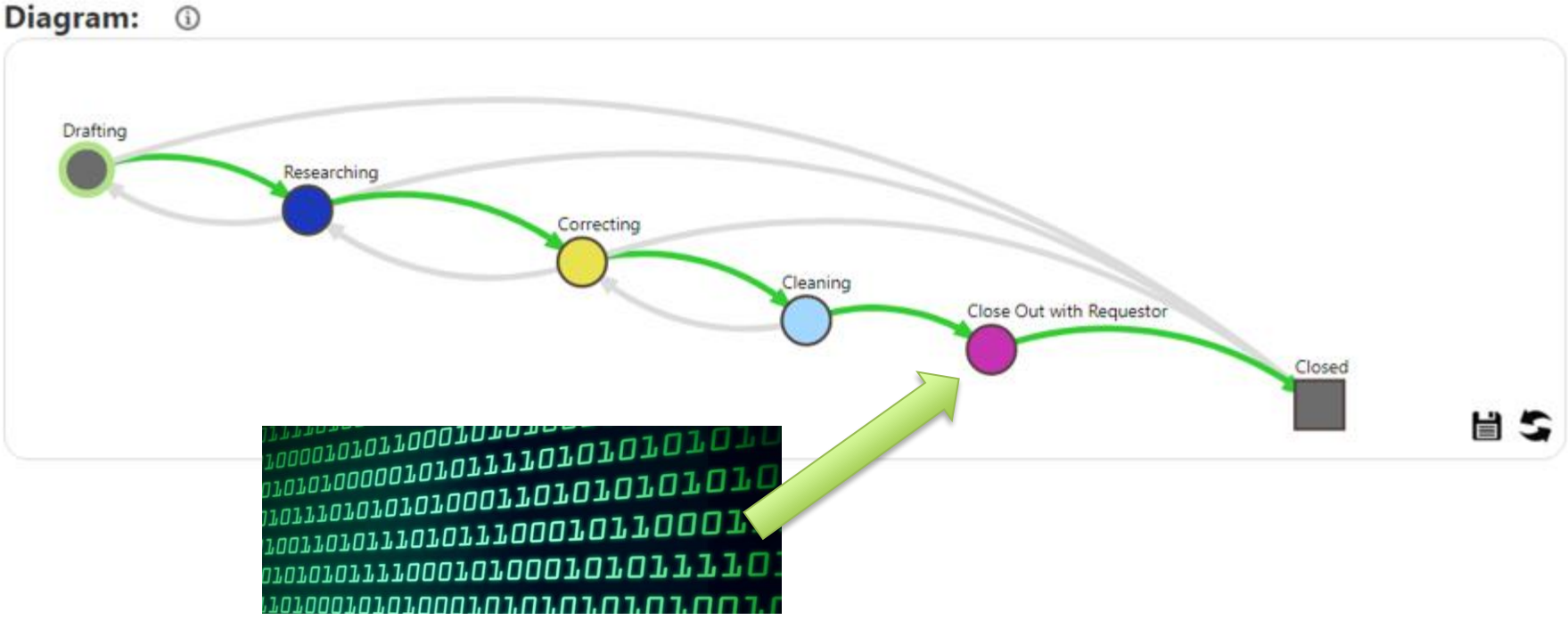
Background and Context

- Designing customer service workflows with the requester in mind



Background and Context

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



Feature Walk-through

- Applying the Designated Requester to your workflows

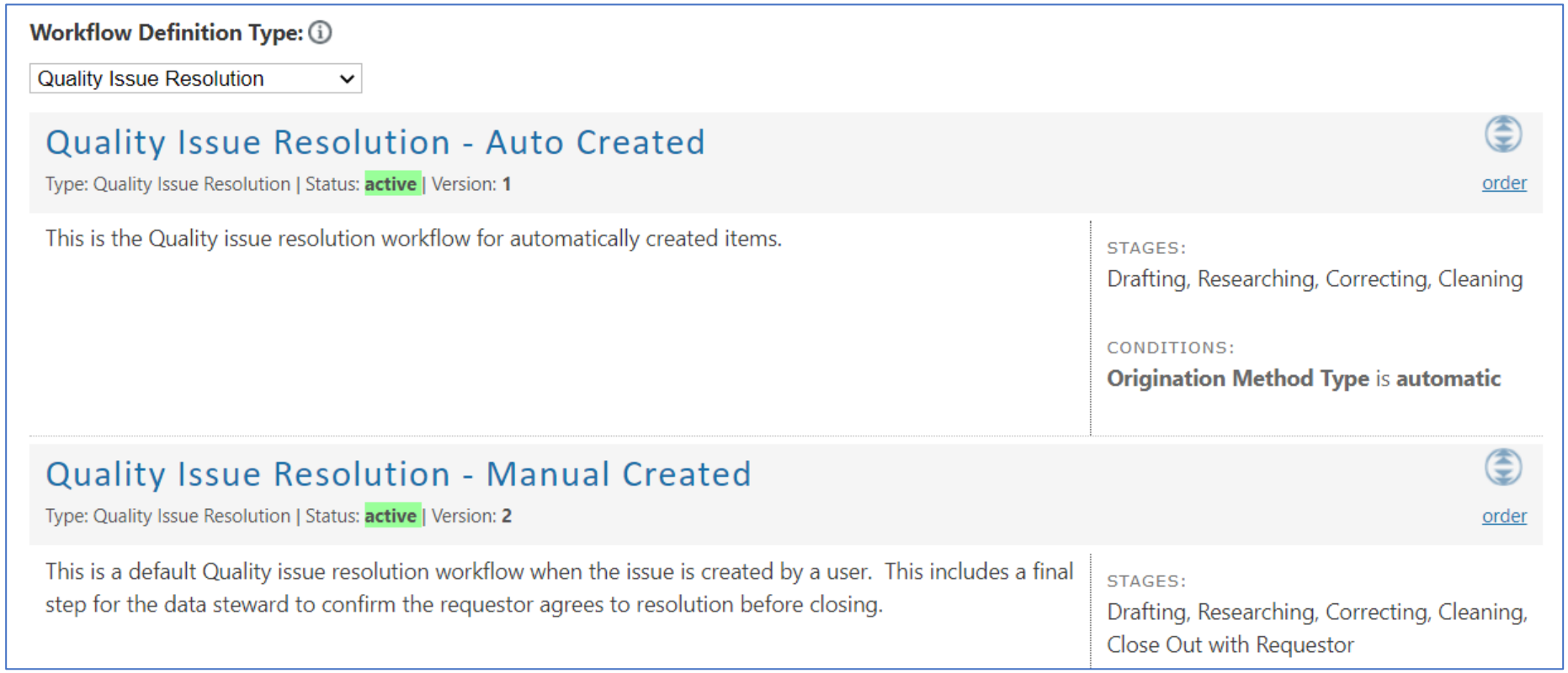
Origination Methods

- 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



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.

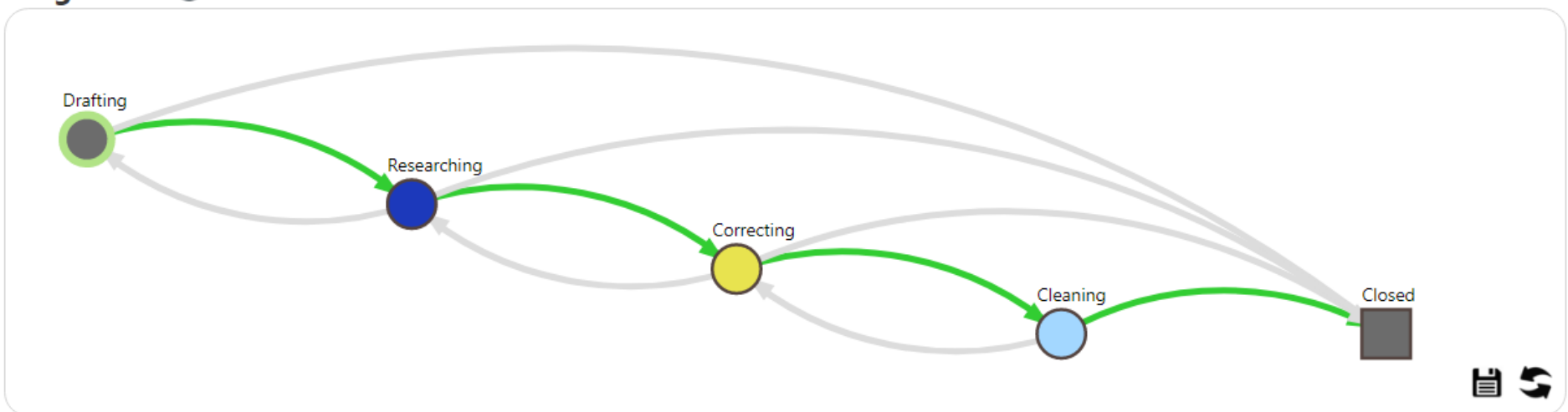
Conditions:

Origination Method Type is automatic

Workflow-level Automatic Named Role Assignments:

Named Role	User Mapping
Designated Requester	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.

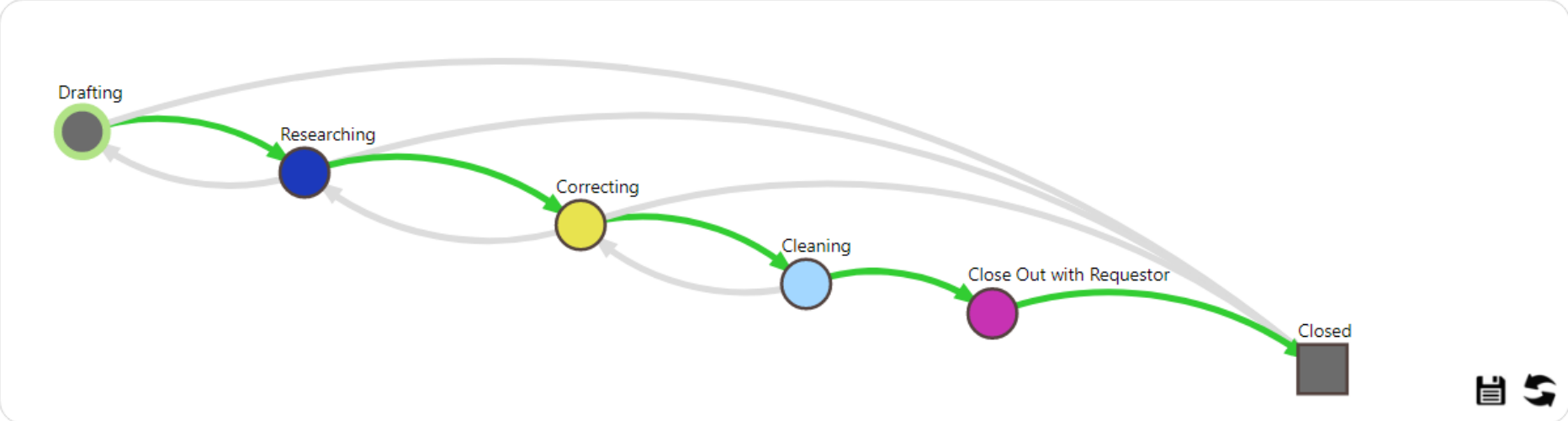
Conditions:

None

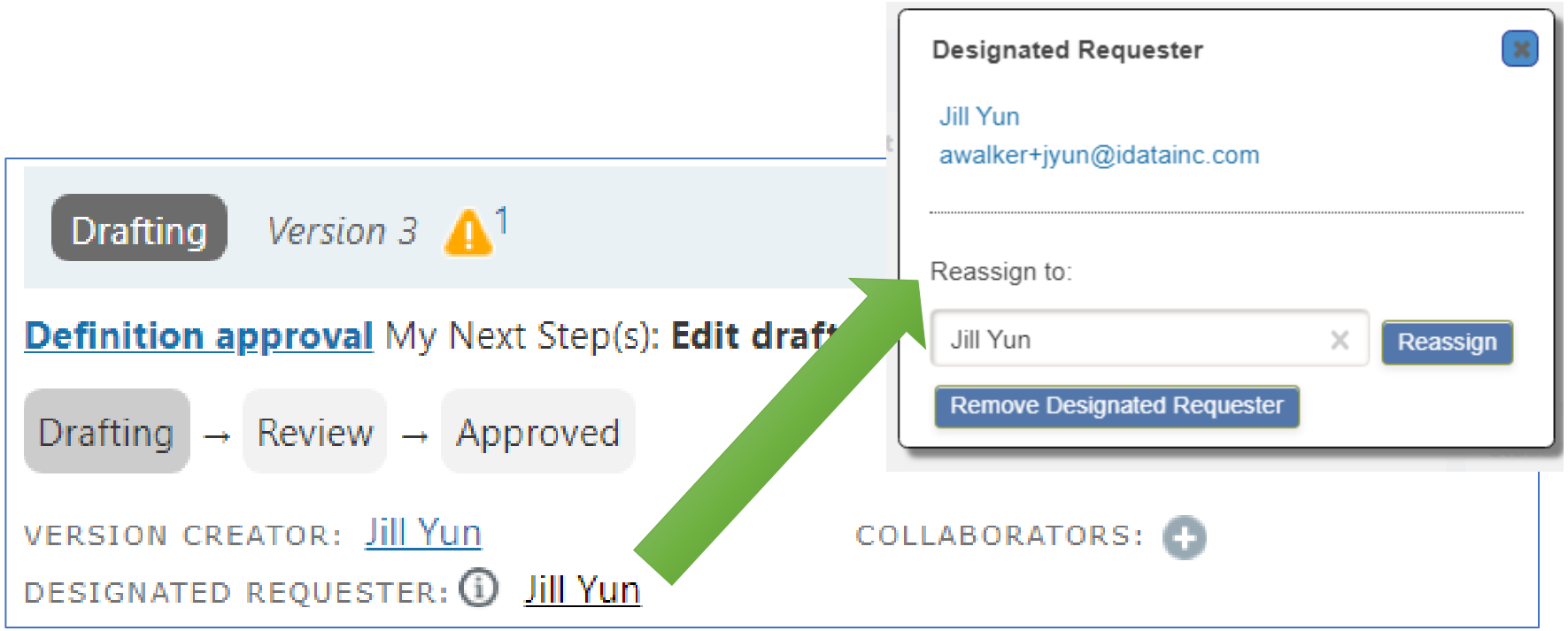
Workflow-level Automatic Named Role Assignments:

None defined

Diagram:



Manual Addition



Role User Assignment Mappings

Role by Functional Area

Edit

Back to User Mappings

Description:
Maps individuals to specific functional areas

Users:

Default Mapping User: Ailene Program

Functional Area	User
Main Organization	Ailene Program
Financial Management	Marci Money
-- Banking	Marci Money
Information Technology	Joe Gunchy
-- Development	Ailene Program
-- Documentation	Ed Itor
-- Quality Assurance	***Rolls up to parent or default (Joe Gunchy)***
-- Systems Management	Seth Curity
Resource Management	Holly R. Source
-- Compliance	Holly R. Source
-- Demographics	Holly R. Source

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

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News Updates

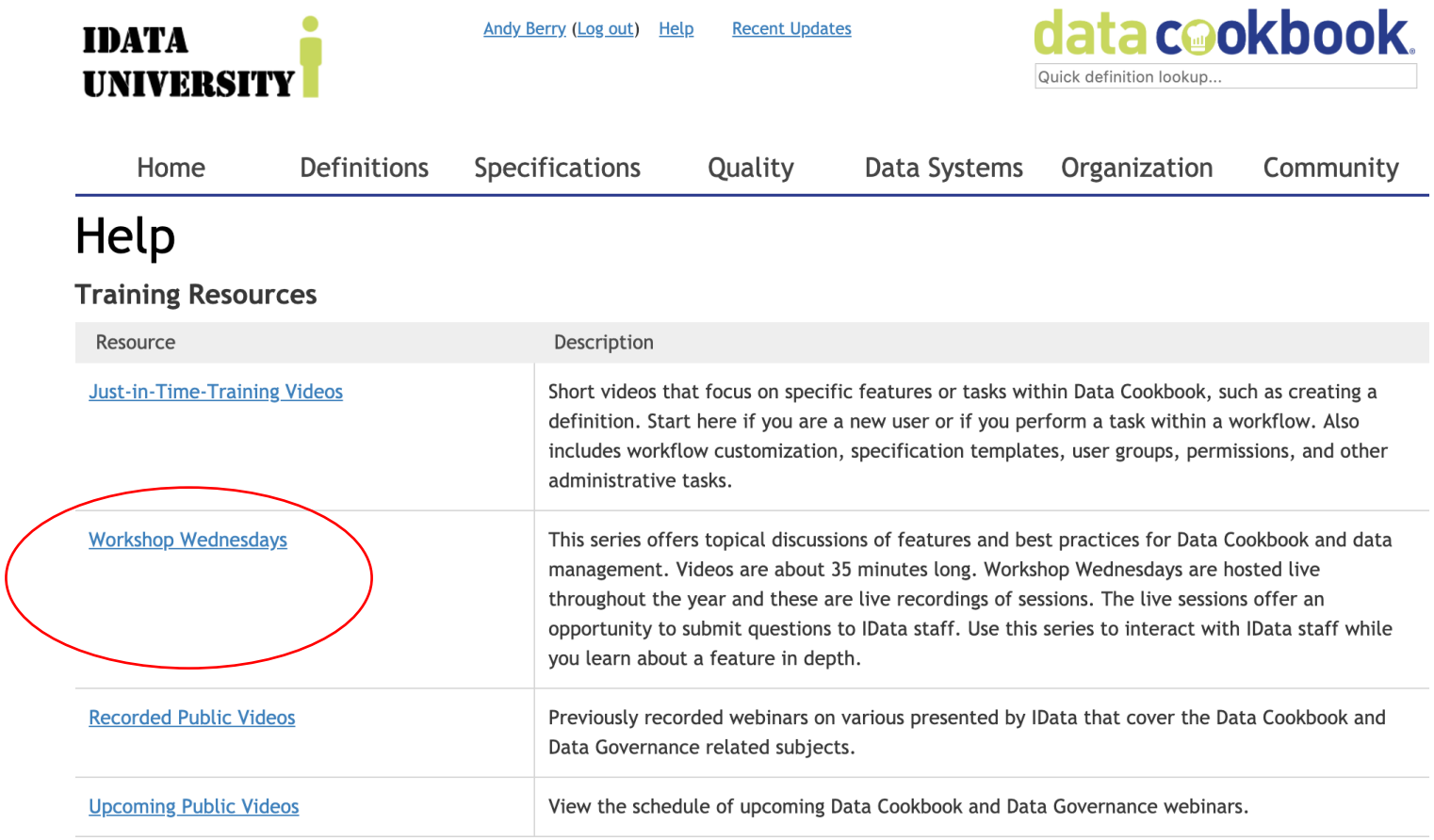
News, Updates, & Social Media

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

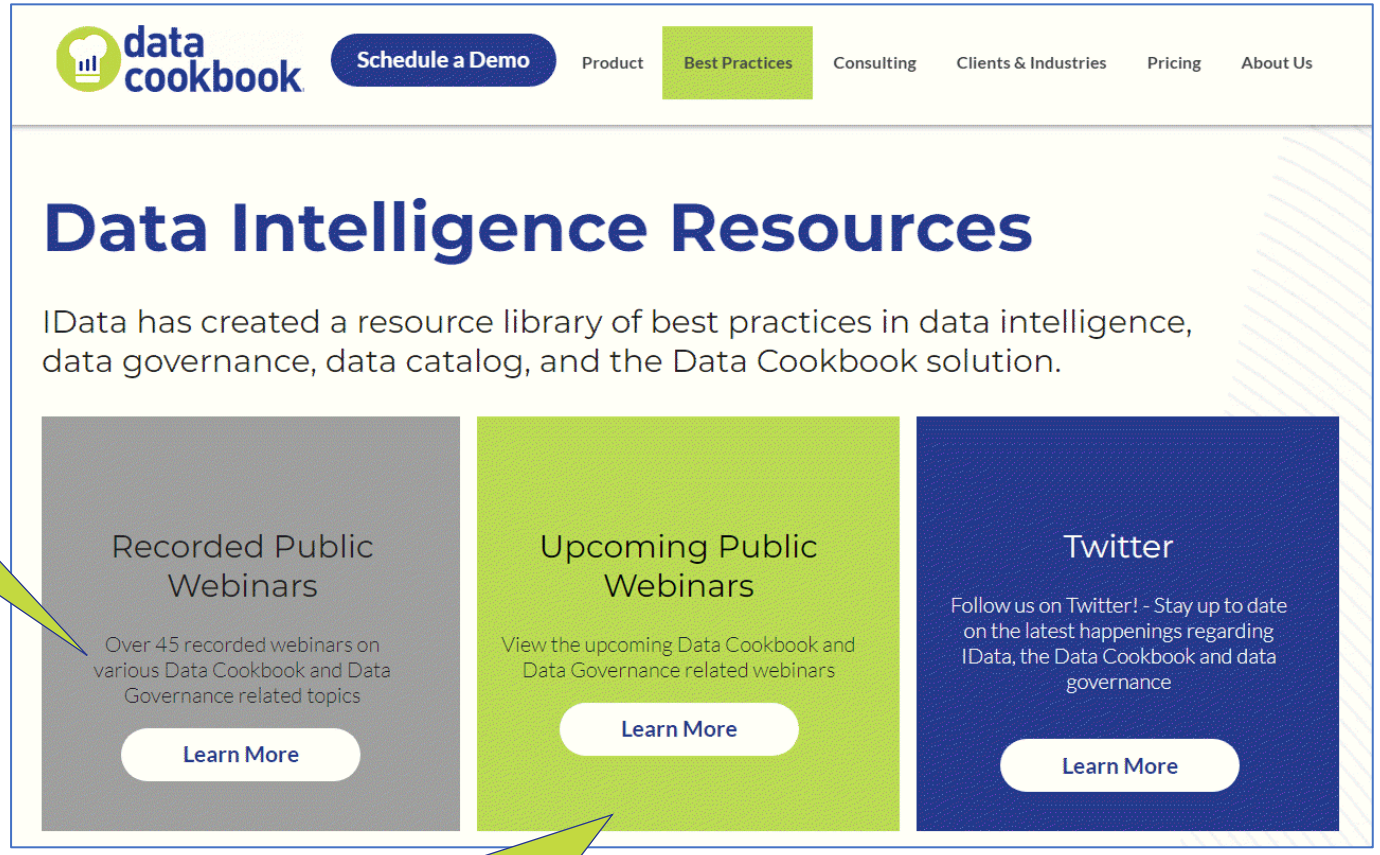
Workshop Wednesday Recordings



Data Governance Resources

www.datacookbook.com/DG

Browse previous webinars

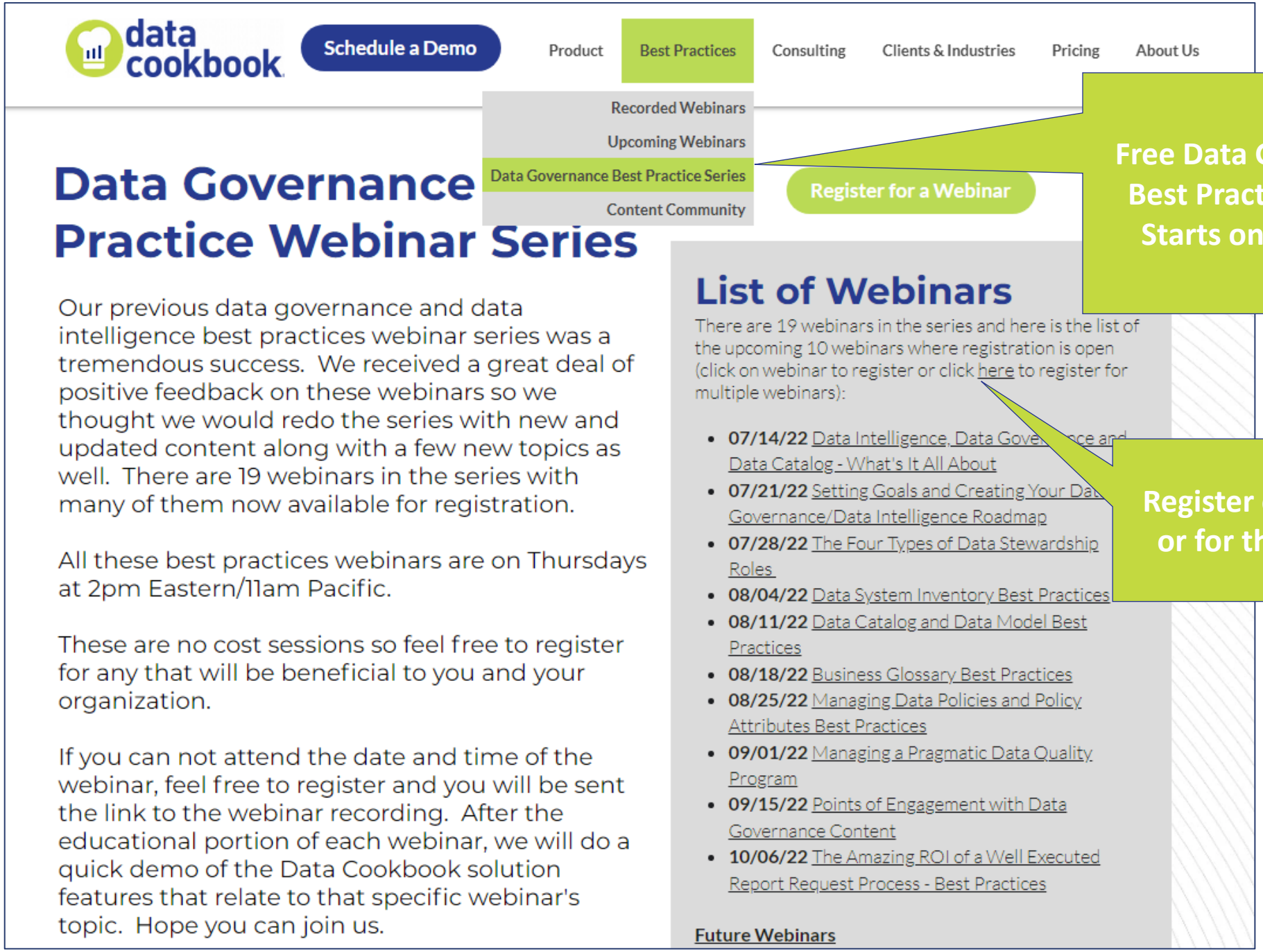


Do you need to sign up for the next webinars?

Data Intelligence Topics

Webinars listed by topic

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 Da	Best Practice	30 Minutes	To View
Building Adoption and Buy-in			
• Roles in Data Governance - Value, Responsibilitie	Best Practice	60 Minutes	To View
• Understanding DG Perspective & Benefits to Diff	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	Best Practice	60 Minutes	To View
• Solving the Hardest Part of Rep	Best Practice	60 Minutes	To View
• Why Do Most Data Gov ance 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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Free Data Governance Best Practices Series Starts on July 14th.
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.
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 Gove nce and Data Catalog - What's It All About
07/21/22 Setting Goals and Creating Your Dat 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

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!

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