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

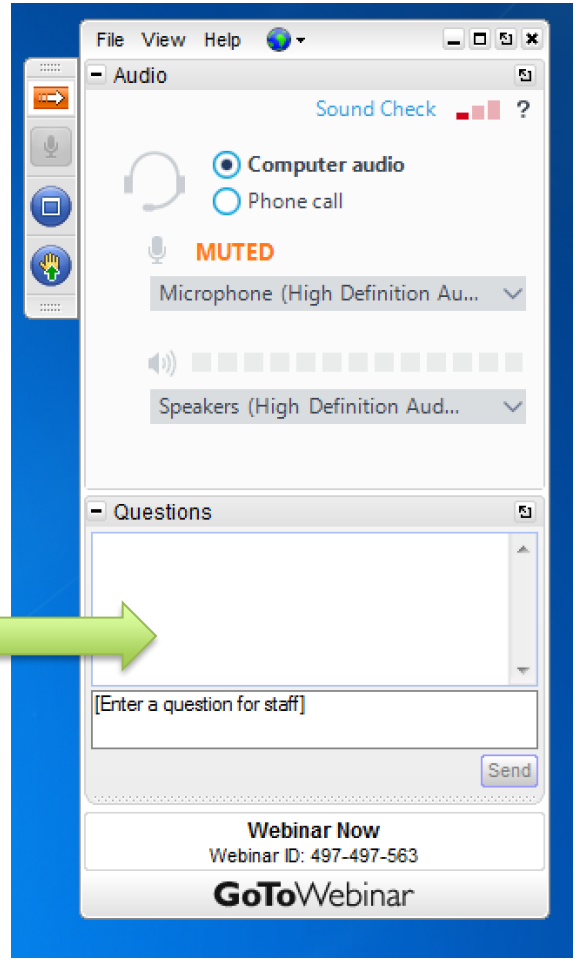
1st 45 minutes Presentation recorded

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

Brenda Reeb

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Jim Walery

IData, Director of Marketing

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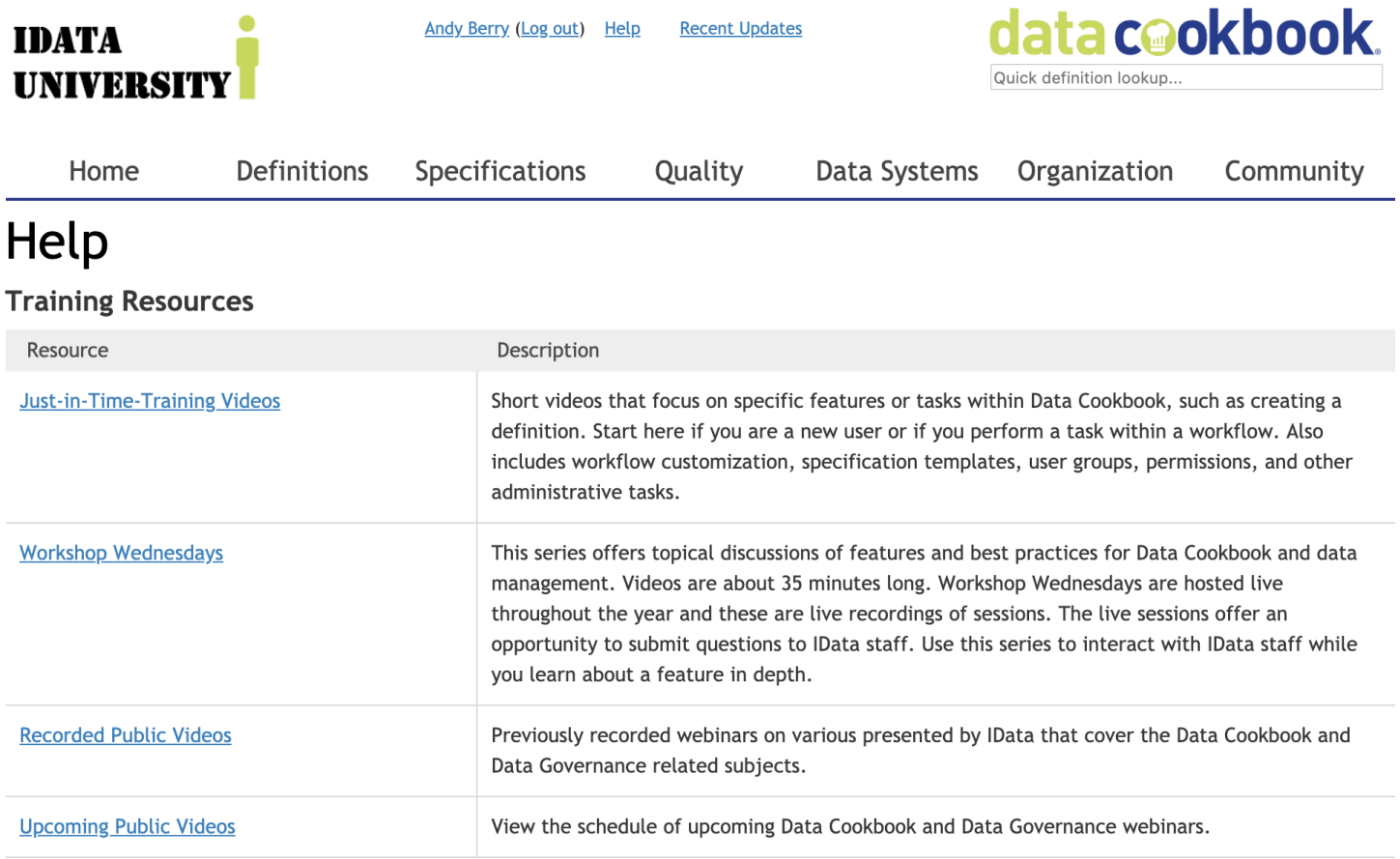
Training Resources

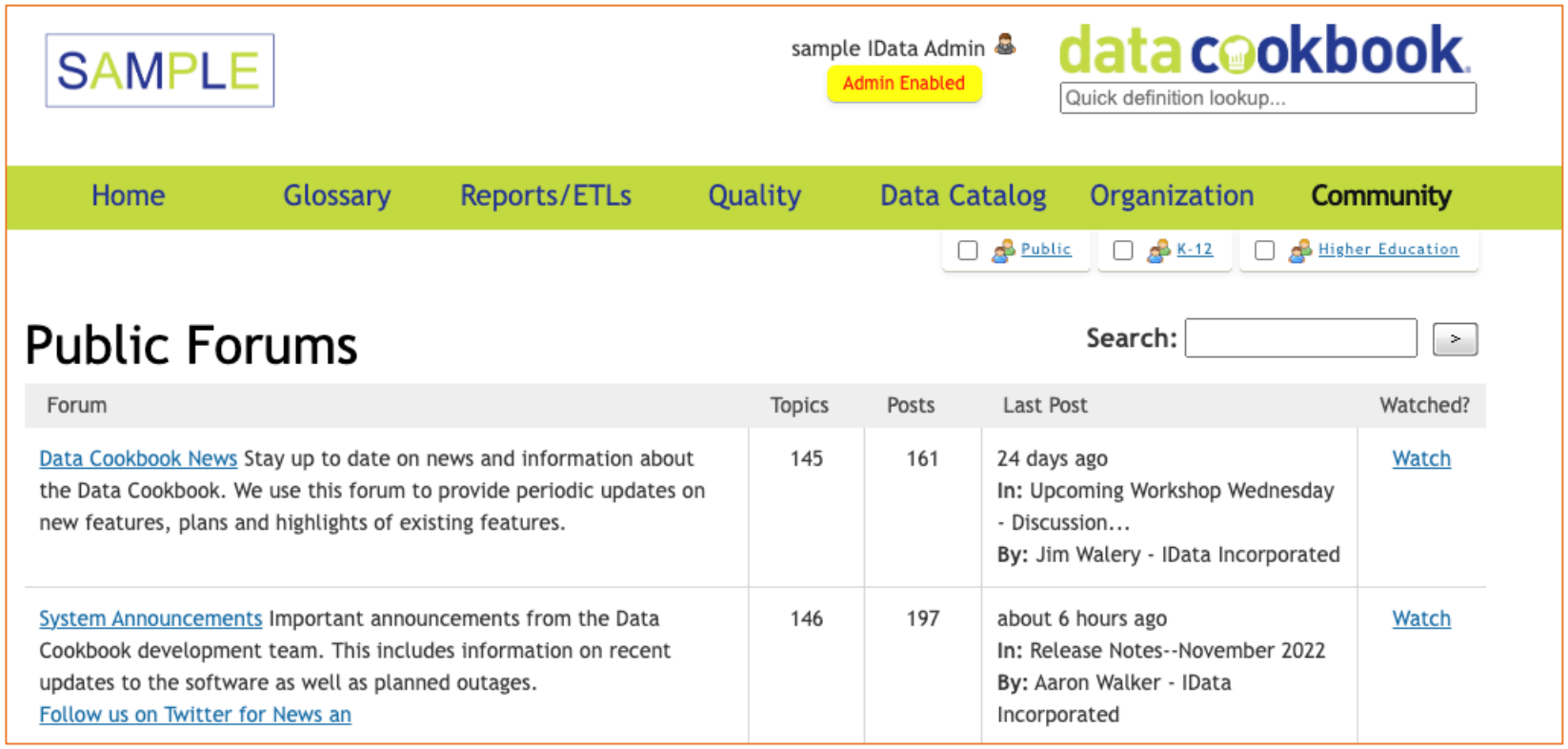


Workshop Wednesday Agenda

- 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



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)

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

Owner

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

3. Do more with individual users

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

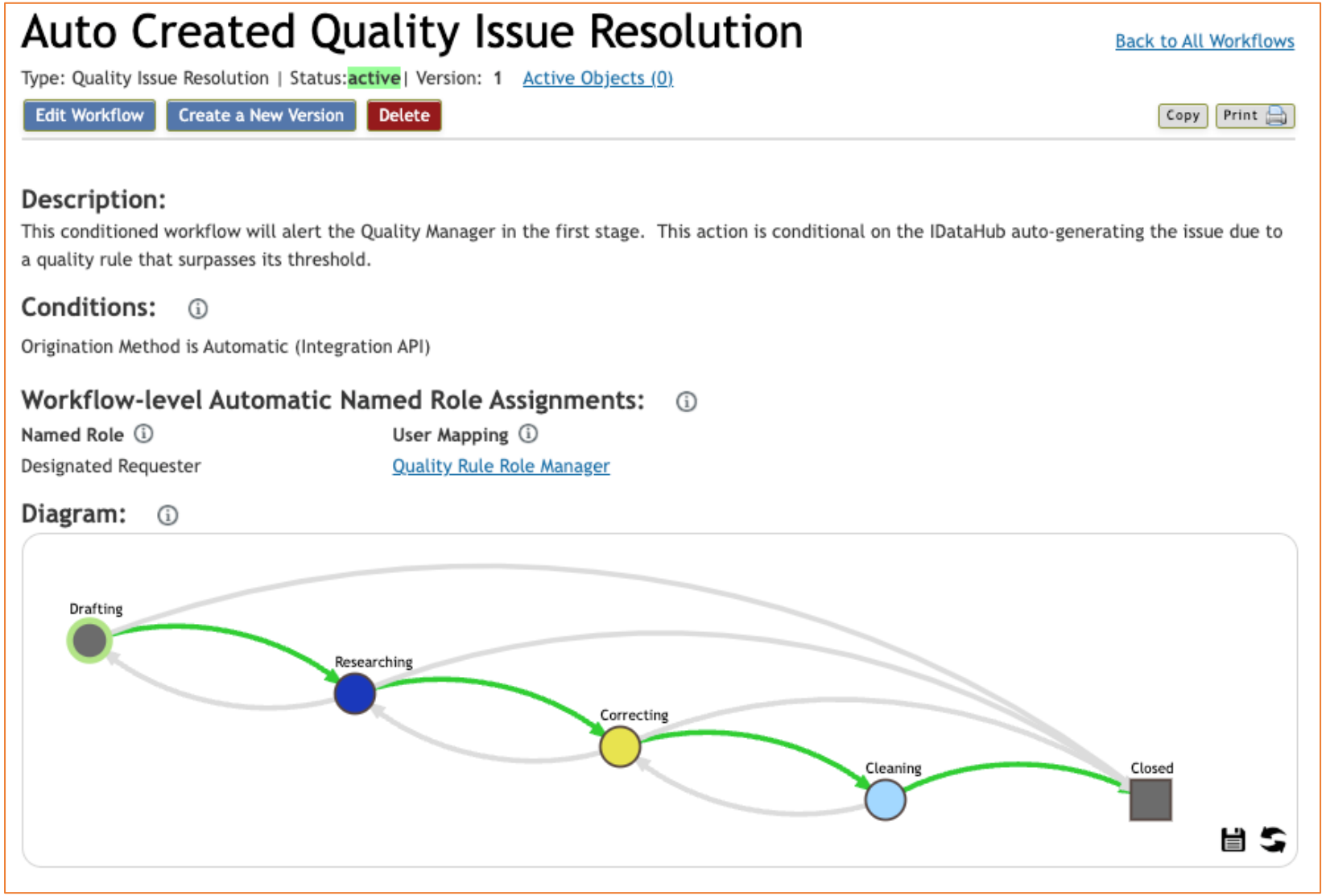
3.1 Workflows

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



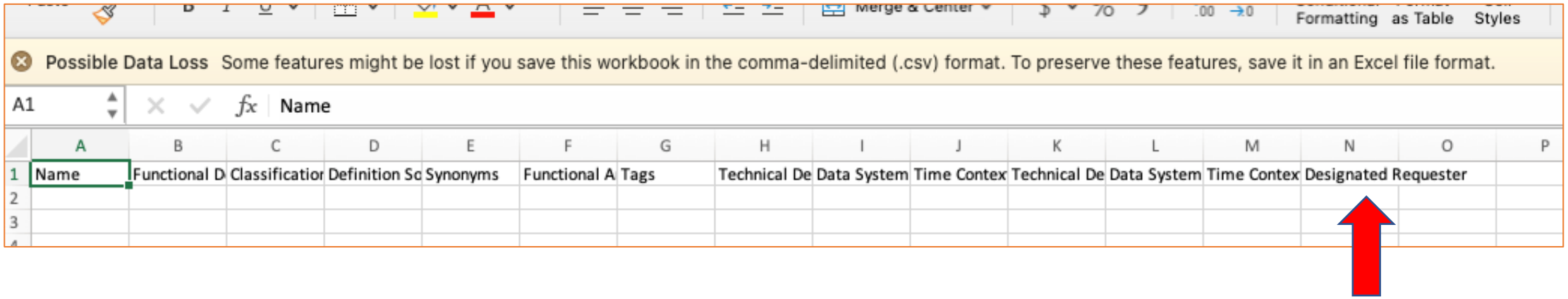
3.2 Additional Attribute: Contact

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

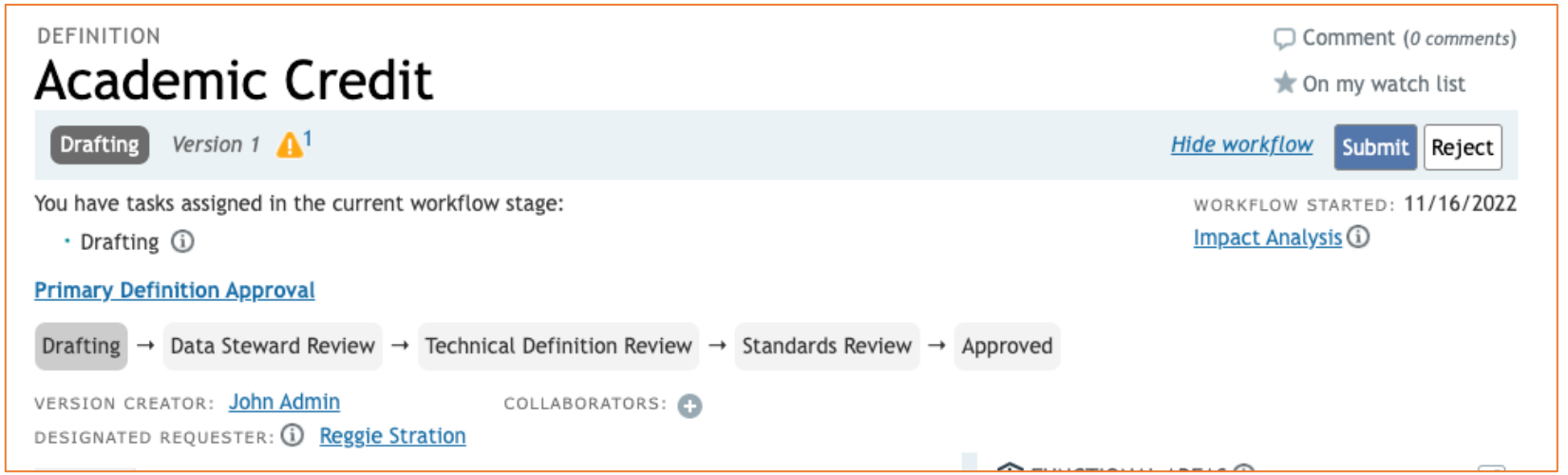
SAMPLE

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

3.3 Bulk import definitions as Proxy



John Admin imported definitions; named Reggie as Designated Requester



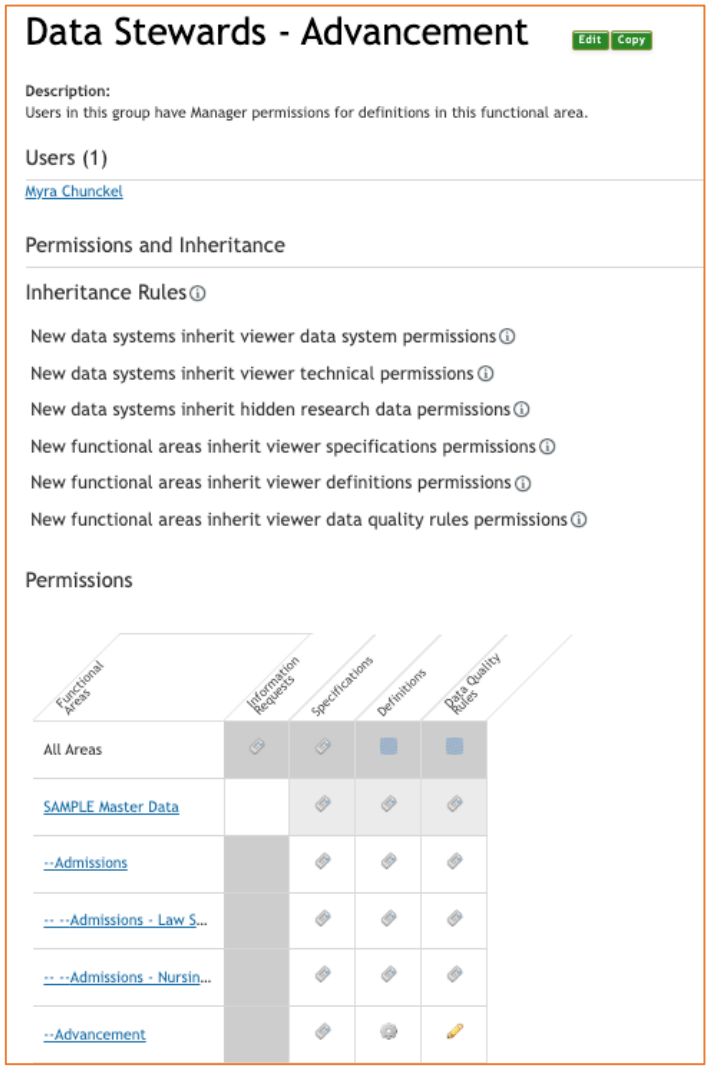
4. Manage user groups and user permissions

- 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

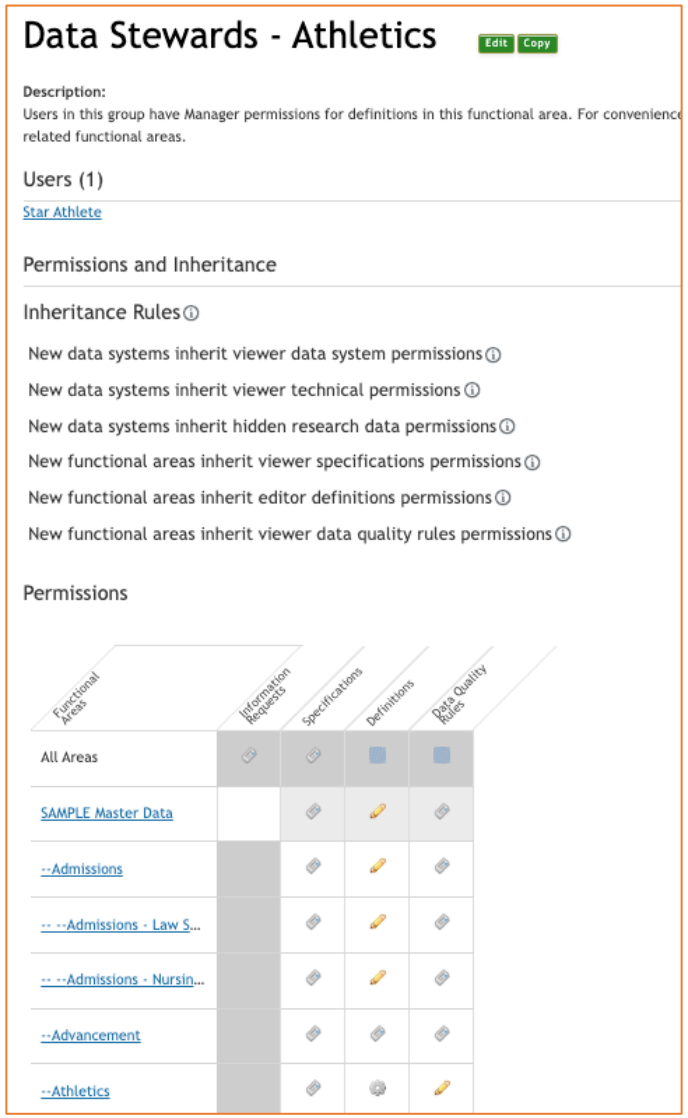
Permissions and Inheritance

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				
SAMPLE Master Data				
--Admissions				
-- --Admissions - Law S...				
-- --Admissions - Nursin...				
--Advancement				



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				
SAMPLE Master Data				
--Admissions				
-- --Admissions - Law S...				
-- --Admissions - Nursin...				
--Advancement				
--Athletics				

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

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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

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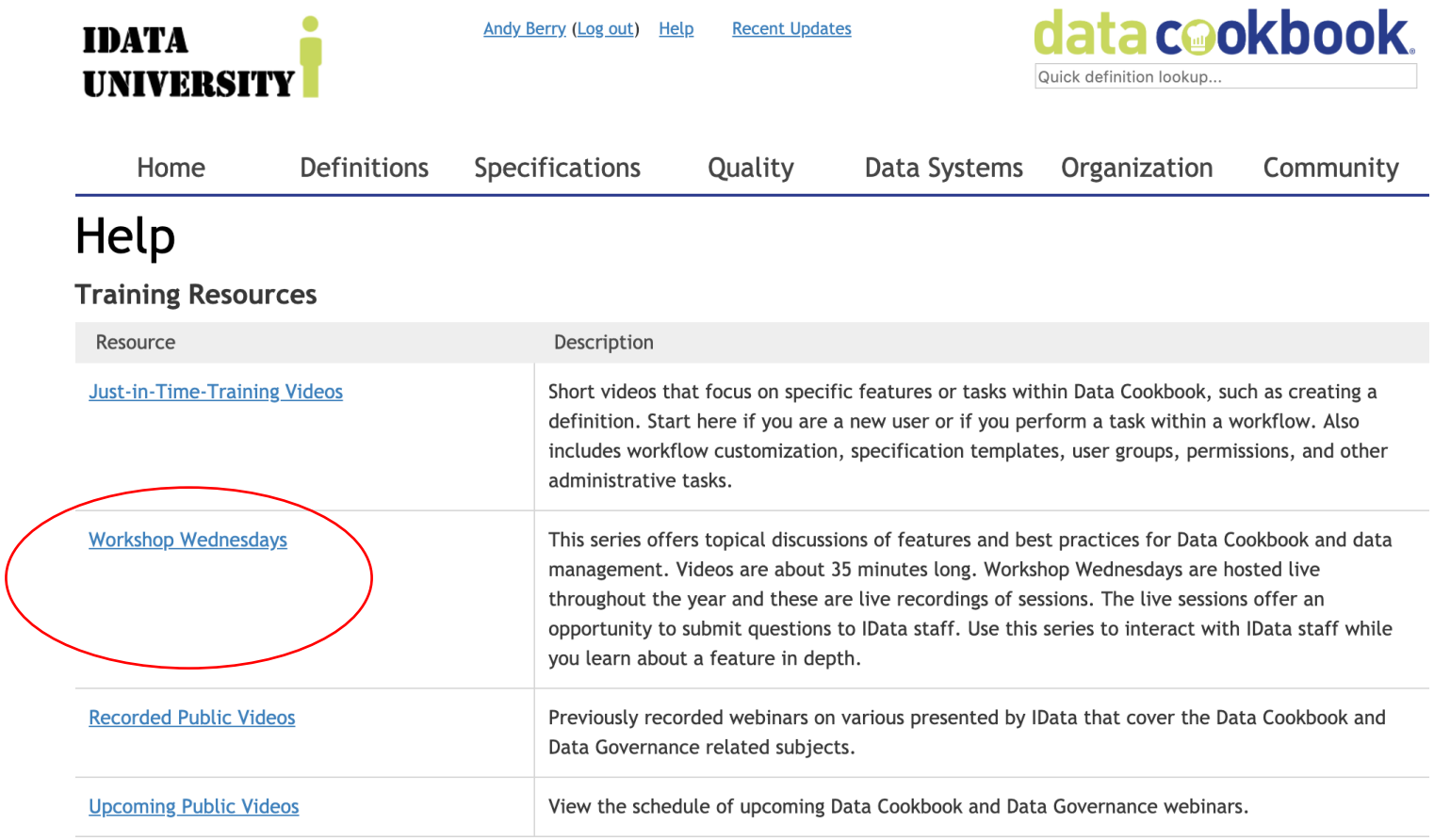
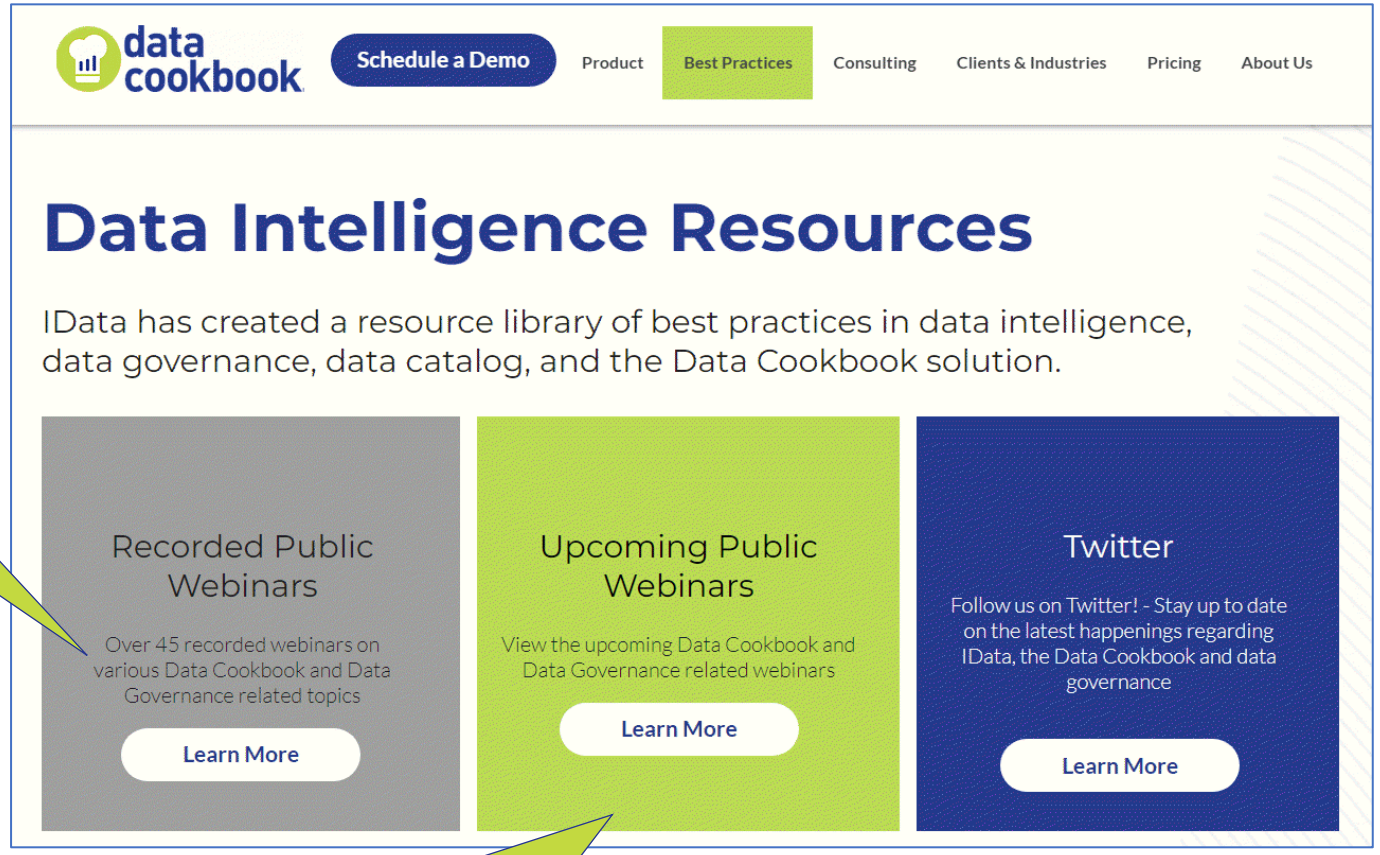
Workshop Wednesday Recordings



Data Governance Resources

www.datacookbook.com/DG

Browse previous webinars

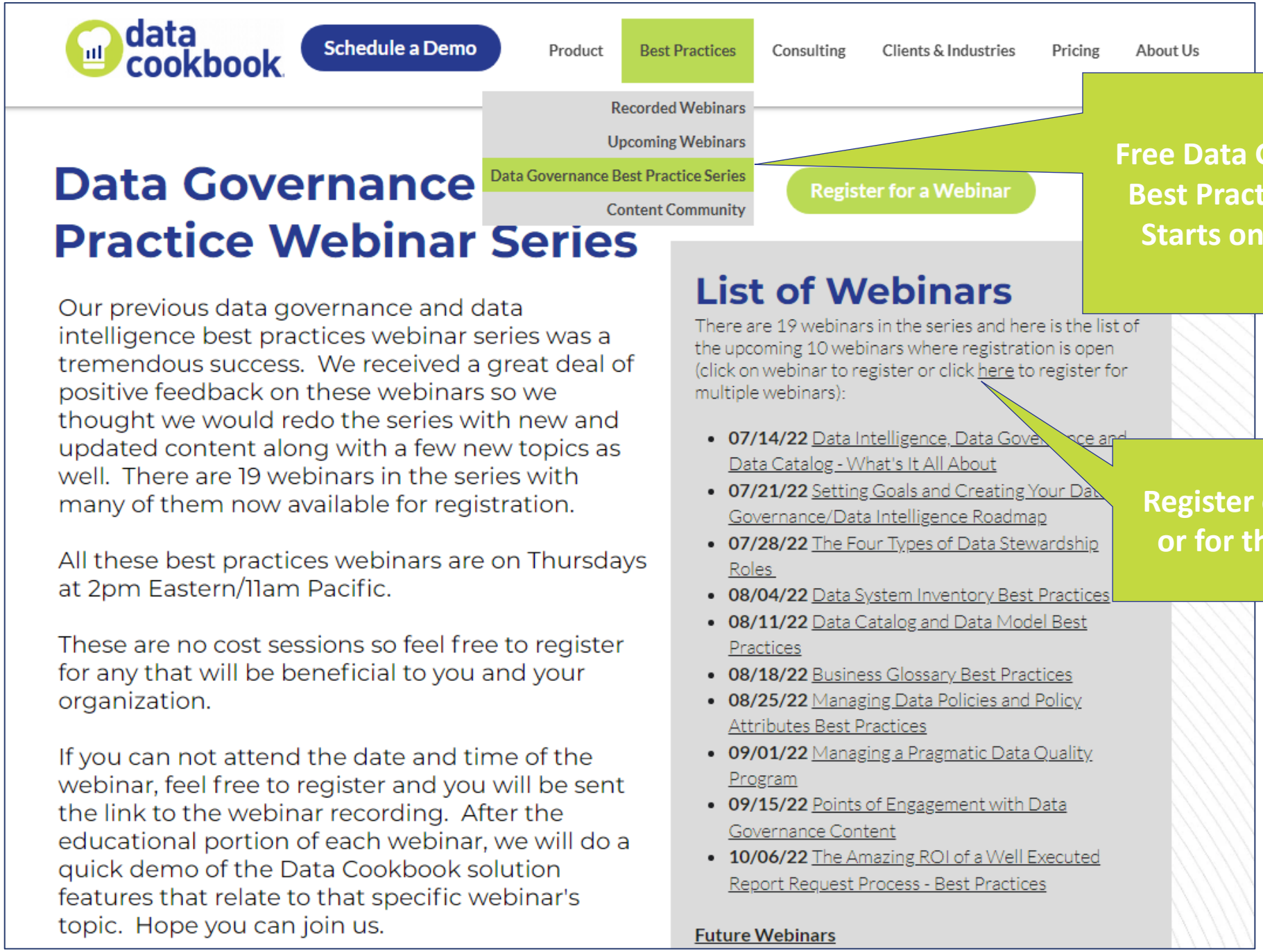


Do you need to sign up for the next webinars?

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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Content Community
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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

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  - What topics would you like IData to focus on in future webinars?
  - Would you like to schedule a Data Governance support consultation?

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Thank You!

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