



Data Cookbook Workflow Updates

Review of Data Cookbook workflow options with special attention to
2022-23 additional features.

Logistics

- 1st segment is presentation and will be recorded
- 2nd segment is Q&A and will not be recorded
- You will receive the link to the recording tomorrow
- If question or comment put in the chat/question box

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Workshop Wednesday Agenda



1. Overview and history of approval workflows
2. Summary of recent updates



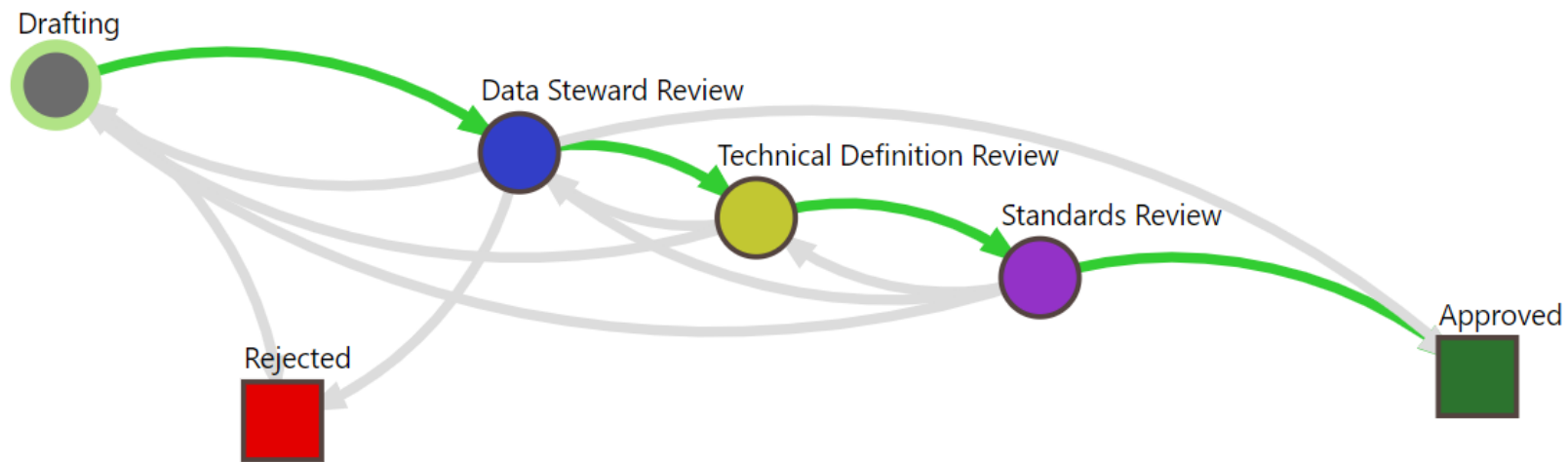
Original workflows

1. Definitions: Draft (Editor) → Review (Moderator) → Approved
2. Specifications: Draft → Assign → Submit for Approval → Approved

The background features two large, overlapping, curved lines. One line is a light blue color and the other is a light green color. They are positioned in the top right and bottom left corners of the slide, framing the central text.

Introducing: client control!

Additional stages and steps



Additional assigned users

- Named roles
- Assignment mappings
- Direct user group assignment

Standards Reviewer

Edit

[Back to All Named Roles](#)

User Groups to be selected from

User Group Name	Users Count
Data Cookbook Content Managers	1
Data System Manager	1
Quality Editor	1

User Groups that will make the selection

User Group Name	Users Count
Data Cookbook Content Managers	1


Data Stewards by Functional Area

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[Back to Workflow User Group Mappings](#)

Description:

This assignment mapping identifies the data stewards that will moderate definitions based on their functional area.

Functional Area	User Groups 
SAMPLE Master Data	Data Steward Manager
Admissions	Data Stewards - Admission
-- Admissions - Law School	Data Stewards - Admissions - Law School
-- Admissions - Nursing School	Data Stewards - Admissions - Nursing School
Advancement	Data Stewards - Advancement
Athletics	Data Stewards - Athletics
Enrollment	Data Stewards - Enrollment
Finance	Data Stewards - Finance

Name	Description	Options	Users required to act	Allowable Actions	Timeout	Stage Transition Actions	Conditions	Assignments
HR Data Steward Review	Edit and approve the name, functional definition, functional area assignment, tags, synonyms, and related content. Enter a technical definition for the HR system or other systems. Review all fields for completeness and accuracy.	Required: Yes Prevent Entry if No Users to Take Action: Yes Generate Task Items: Yes	Any	Edit Collaborate	0	Approve Return to Drafting Reject		Data Stewards - Human Resources

HR Definition Approval

Type: Definition Approval | Status: **active** | Version: 1



[order](#)

This workflow has 2 Stages and applies to HR definitions. The Stages are Drafting and Data Steward Review. In Drafting, any user with Editor or Moderator permissions for a functional area can create a definition. In Data Steward Review, the HR data steward(s) reviews all fields, including technical definition.

STAGES:

Drafting, Data Steward Review

CONDITIONS:

Functional Area is Human Resources

Designated Requester for Finance Definitions

Type: Definition Approval | Status: **active** | Version: 1



[order](#)

This workflow demonstrates the Designated Requester role. In this workflow, the Designated Requester can edit or collaborate in the Import Stage (first stage) when a different user imports definitions on the Designated Requester's behalf. In the second stage, the definition is routed to a Data Steward based on

STAGES:

Import, Data Steward Review

CONDITIONS:

Functional Area is Finance

Primary Definition Approval

Type: Definition Approval | Status: **active** | Version: 1



[order](#)

Multiple (conditional) workflows

Object queues and bulk actions

Available for action by me

Submit

Displaying **all 5** definition approvals

Name	▼ Date started	Date last updated	Version	Stage	Named roles	Select all
Receivable	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	<input type="checkbox"/>
Current Fiscal Period	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	<input type="checkbox"/>
Budgeted Amount	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	<input type="checkbox"/>
Aging Period	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	<input type="checkbox"/>
Active Employee	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	<input type="checkbox"/>

Collaboration and role reassignment

You have tasks assigned in the current workflow stage:

- Step for Importer ⓘ
- Step for Designated Requester ⓘ

Designated Requester for Finance Definitions

Import → Data Steward Review → Approved

VERSION CREATOR: [John Admin](#)

DESIGNATED REQUESTER: [John Admin](#)

COLLABORATORS: +

[Bea Wright \(commenter\)](#) [Finn Aid \(editor\)](#)

[Ginny Job \(delegate\)](#)



Recent
updates

Designated requester

Auto Created Quality Issue Resolution

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

[Edit Workflow](#)

[Create a New Version](#)

[Delete](#)

Description:

This conditioned workflow will alert the Quality Manager in the first stage. This action is conditional on 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

Designated requester


Quality Rule Role Manager

[Edit](#) [Copy](#)

[Back to Role User Mappings](#)

Description:

Default Mapping User: [Bea Wright](#)

Functional Area	User 
SAMPLE Master Data	Bea Wright
Admissions	Lettie Mein
-- Admissions - Law School	<i>Rolls up to parent or default (Lettie Mein)</i>
-- Admissions - Nursing School	<i>Rolls up to parent or default (Lettie Mein)</i>
Advancement	Myra Chuncel
Athletics	Star Athlete
Enrollment	Reggie Stration
Finance	Marci Money
Financial Aid	<i>Rolls up to parent or default (Bea Wright)</i>

Designated requester

Step for Quality Rule Manager		Required: No	Any		0	Back to correcting		Designated Requester	conditions edit x
		Prevent Entry if No Users to Take Action: Yes				Cleaning complete			
		Generate Task Items: Yes							

Stage: ▼ ⓘ

Name	Initial Stage	End Stage	Default Next Stage (Happy Path)	Object Counts
<input type="text" value="Accepted"/> - name. <input type="text" value="#329ac7"/> - background. <input type="text"/> - font color.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="--Undefined--"/> ▼	0

or [Cancel](#)

Final stage flexibility

Discard/revert new version

 RELATED DEFINITIONS (1) 

Employee Type



 RELATED QUALITY RULES (0) 

No Related Quality Rules



 QUALITY ISSUES (0) 

No Quality Issues



 COMMUNITY SHARING (0) 

There are no communities available. View your community settings [here](#).

Delete this definition

Copy this version

Discard this version

Add a Comment:

@Ginny Job Anything to add before we approve?

Add Comment

Tag users in comments

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Full administrator override

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Want to learn more?

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Questions?

Let Us Know



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