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

- **Aaron Walker**
  - IData, Data Management Consultant
  - awalker@idatainc.com

- **Jim Walery**
  - IData, Director of Marketing
  - jwalery@idatainc.com

Workshop Wednesday Agenda

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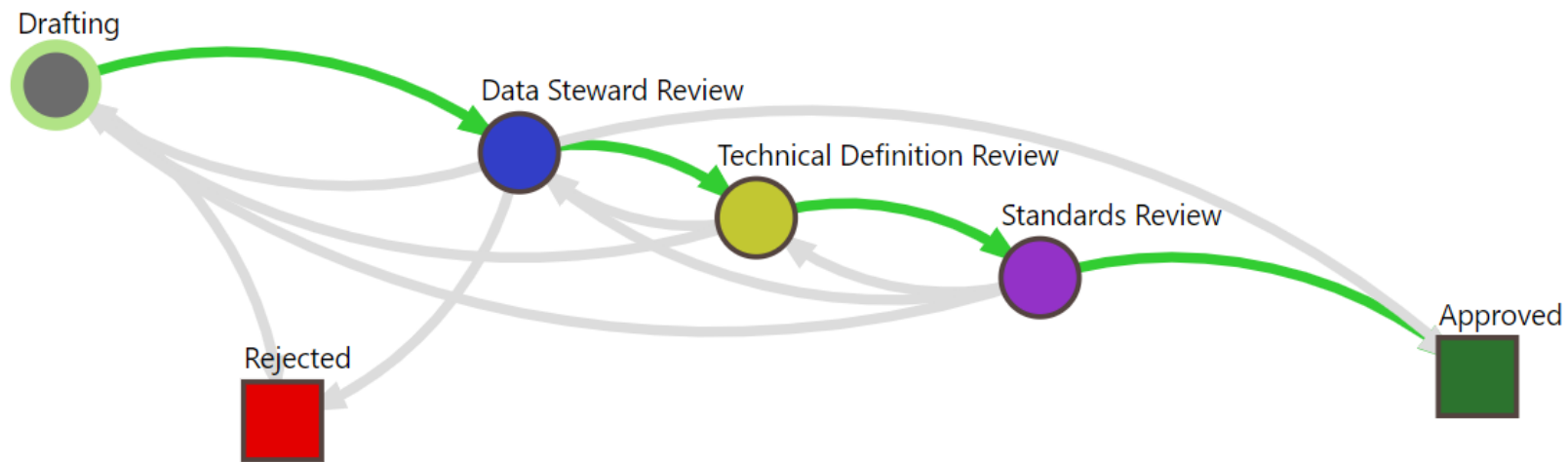
2. Summary of recent updates

Original workflows

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

Introducing: client control!

Additional stages and steps

Additional assigned users

- Named roles
- Assignment mappings
- Direct user group assignment

Standards Reviewer Edit

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 Edit Copy

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 Requesters 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**

<div align="right">Submit</div>

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	☐
Current Fiscal Period	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	☐
Budgeted Amount	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	☐
Aging Period	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	☐
Active Employee	12/27/2022	12/27/2022	#1	Import	VERSION CREATOR: John Admin	☐

Collaboration and role reassignment

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
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`

Description:

Default Mapping User: Bea Wright

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

Designated requester

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

Final stage flexibility

Discard/revert new version

Tag users in comments

Full administrator override

Want to learn more?

Questions?

Let Us Know

Follow us on LinkedIn for company and product information
www.linkedin.com/company/idata-incorporated

Follow us on Twitter for up-to-the-minute information
@idatainc and @datacookbook

Subscribe to our YouTube Channel for how-to videos
www.youtube.com/user/DataCookbook

Subscribe to our blog posts for data management thought leadership
www.idatainc.com/insights/

Follow us, share with others and provide us with content we can tweet out

marketing@idatainc.com