Specifications 5 Ways

Reports and other data deliverables vary in format, purpose, and perceived value. For example, an ad hoc exploratory report might be used by two people, standard operational reports might be consumed by hundreds of casual data users, or a comprehensive dashboard might support the daily work of a core group of staff.

In this session, learn how to customize Specifications so that the level of effort you put into a specification matches the use case and audience for that data deliverable. This session uses the Enterprise license level.

Workshop Wednesday #13

January 22 2020

Logistics

- 1st half of session is presentation and will be recorded
- 2nd half of session is discussion 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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Welcome

Say Hi in Chat – institution, number of people, what you want to learn about

Workshop Wednesdays on the horizon -   2PM EST

    January 22 Specifications Five Ways

    February 26 How to Import Content in Bulk

Agenda

- Review new Help page
- Framework for today
- Quick Review – Specification Templates and Types
- Review 5 Use Cases

Data Cookbook Help Page

Training Resources

Home   Definitions   Specifications   Quality   Data Systems   Organization   Community

Help

Training Resources

Resource	Description
Just-in-Time-Training Videos	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.
Workshop Wednesdays	This series offers topical discussions of features and best practices for Data Cookbook and data management. Videos are about 35 minutes long. Workshop Wednesdays are hosted live throughout the year and these are live recordings of sessions. The live sessions offer an opportunity to submit questions to IData staff. Use this series to interact with IData staff while you learn about a feature in depth.
Recorded Public Videos	Previously recorded webinars on various presented by IData that cover the Data Cookbook and Data Governance related subjects.
Upcoming Public Videos	View the schedule of upcoming Data Cookbook and Data Governance webinars.

Documentation

Documentation

Document	Last Updated	Description
User's Guide	11/19/2019	Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.
Administrator's Guide	09/18/2019	Reference documentation for administrators of the Data Cookbook. The admin guide includes information on configuring the account as well as managing permissions and designing worfklows.
External Authentication	08/21/2019	The Data Cookbook allows organizations to authenticate users through their existing authentication repositories. Currently it supports LDAP, Active Directory, CAS and Shibboleth protocols. This document provides details for administrators on configuring external authentication for your organization.
Test Instances	08/21/2019	Reference documentation for administrators and users who are working in the Test Instance of the Data Cookbook.
Metrics Dashboard	11/19/2019	Reference documentation for users for working with the Metrics Dashboard feature, which provides insights into your organization's usage of the Data Cookbook.
Private Community User's Guide	08/21/2019	Reference documentation for users who have access to a private community. This guide should be used in conjunction with the Data Cookbook User's Guide

Support

Support

Resource	Description
Email Support	Send an email to our dedicated Data Cookbook support for help with your specific question or issue
Phone Support	Call us toll Free at (877) IDATA44--(877) 432-8244--and press "1" for Data Cookbook support
Extra Data Cookbook Resources	Find additional client resources from Data Cookbook knowledge base for using and implementing the Data Cookbook.
Questions and Support forum	Browse questions asked by other users or post your own questions about how to work with the Data Cookbook.
System Announcements Forum	Find important announcements from the Data Cookbook development team, including information on recent updates to the application as well as planned outages

Framework for your Use Cases

1. Who benefits? Business or Technical?

2. How much effort supports the goal?

3. Make decisions, communicate decisions, act from the decisions.

4. Roadmap – Now vs Ideal or Future

5. Check in with the consumers. Ask for specifics on how their work has improved using specifications. No specifics? Regroup.

6. Write it down

Specification Templates and Types

- Customize templates 3 ways
  - Remove fields
  - Add custom fields
  - Make Required
- Associate a Template with a Type; define your Types
  - Many to One – Template to Type
  - Types are workflow conditionals

5 Ways or Use Cases

1. Ad hoc exploratory report used by two people for 2 weeks then discarded

2. Standard operational report consumed by hundreds of casual data users every month

3. New report requests for reports from data warehouse data

4. ETL between data system and data warehouse

5. Data Block as Collection and all of the reports that use the Block

1. Ad hoc exploratory report used by 2 people for 2 weeks

Login as dhelper

Specification: Meal Plans and Housing assignments for Transfer Away

Spec Type: Ad Hoc

Spec Template

   Request process; maximum suppressed fields

Workflow: make it quick

Lite Business/Lite Tech

Creates a data point; provides process where there was none. You don't have to play squash together to get some data.

2. Standard Operational Report used by hundreds of users

Specification: Accounts Receivable Aging Report

Spec Type: Cognos Report

Spec Template: Cognos Report Template

Workflow: Review for accuracy and good business scope detail

Heavy business / Lite tech

Effort: Medium

3. New Dashboard Request from Data Warehouse

- Specification Name: International Student Enrollment
- Specification Type: Dashboard
- Template: Dashboard or other visualization
- Notes:
  - No request – handled via pre-existing ticket system
  - Spec delivered with dashboard
  - Medium to high business (requester proxy) and technical effort

4. ETL from Data System A to Data System B

Name: Banner to My Student Athlete System

Type: ETL Primary

Template: ETL Template No Request

Summary: Heavy visual; benefits business user

Note: also a "fast" ETL type

5. Data Block as Collection; reports from Block

Collection: Student Recruitment Data Block
Specifications: Incoming Freshman; Admissions Pipeline by FA Need
Type: Any
Template: Any

Notes: Technical SQL query is recorded once, on the Collection. Report consumer can click back to that through the Collection link.

Questions?

Be Part of the Community
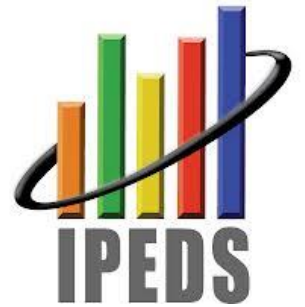
community.datacookbook.com

- Open to everyone

- Content from regulatory agencies and other institutions.

- Data definitions, Specifications, Contact information, Documentation

Watch for your community forum news emails

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

Data Governance Resources Page

Data Governance Resources

Recorded Webinars

IData experts have recorded an entire webinar series on pragmatic data governance including Overview.

View
Recorded Webinar
List

Upcoming Webinars

IData has upcoming Data Governance webinars determined by interest of our webinar attendees.

View
Upcoming Webinar
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Data Cookbook Interest

The Data Cookbook is a leading data governance solution that is right for any sized organization. Learn more by contacting us.

Contact Us

Videos

IData experts have recorded data governance-related videos that are posted on YouTube.

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Blog Posts

IData experts have written data governance-related blog posts on a variety of topics.

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Pragmatic Data Governance eBook

Informative eBook is available that will assist higher education institutions achieve data governance easier and improve their data driven decision making.

Download eBook

http://go.idatainc.com/dg-resources

Workshop Wednesday 2019-2020

- Purpose: Short, fun, and focused on features

- Upcoming Dates and Topics:
  - Wed Dec 4 @2pm EST: Quality Rules Workflow
  - Wed Jan 22 @2pm EST: Specifications 5 Ways
  - Wed Feb 26 @2pm EST: How to Import Definitions

- Review Previous and Upcoming Workshop Wednesdays Here:
  - https://go.idatainc.com/dcb-workshops

- Contact Brenda if you'd like to suggest a topic
  - breeb@idatainc.com

Upcoming Webinars 2019-2020

- Upcoming Webinar Slide
- http://www.idatainc.com/about-us/idata-webinars/
- * feel free to suggest future webinar topics

Upcoming Webinars

- Tues., Dec. 3 - Getting Started with Data Governance 2-3pm Eastern
- Thurs., Jan. 30 - Just-in-time Data Governance 2-3pm Eastern
- Tues., Feb. 11 - The Data Cookbook and a Pragmatic Approach for Implementing Data Governance 2-3:30pm Eastern
- Tues., Feb. 25 - Data Stewardship Best Practices 2-3pm Eastern
- Thurs., March 19 - Data Governance Best Practices 2-3pm Eastern
- Tues., April 21 - Where is My Data? Creating a Data System Inventory 2-3pm Eastern

Registration and More Webinars

Visit Us at Upcoming Events – Say Hi!

In 2020

- Ellucian Live (Orlando) – April

- HEDW (Ogden, UT) - April

- EDUCAUSE (Boston) – October

More to be added to the calendar

Help Us Provide You With Information You Want

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Let Us Know

- Interested in any of the following:
  - ➢ Providing a testimonial quote
  - ➢ Being a Data Cookbook reference
  - ➢ Having a case study done about your institution
  - ➢ Writing a blog post
  - ➢ Co-presenting at a conference or on a webinar
- Send email to marketing@idatainc.com if interested