

All about Tags, Synonyms and Attachments

Workshop Wednesday Series #7

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- **Brenda Reeb**
 - IData, Data Management Consultant
 - breeb@idatainc.com

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



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 *next week*
- If question or comment put in the chat / question box

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#3 Clear Path from Question to Answer (3/16/17)

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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.

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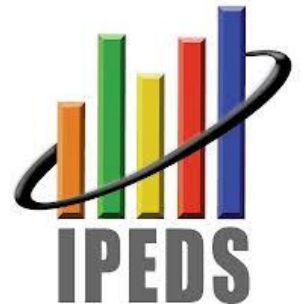
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URL: <https://community.datacookbook.com>

- Open to everyone
- Content from regulatory agencies and other institutions.
- Data definitions, Specifications, Contact information, Documentation



NSLDS



Common Data Set Initiative

*A collaborative effort between publishers
and the educational community*



Watch for your community forum news emails

Agenda

Both license types – Knowledge and Enterprise

- Tags
- Synonyms
- Attachments

Tags - Features

- (login EE as Dan Helper)
- Attribute for objects; create on fly or at Org>Tags
- Same for all license types
- 1 set covers definitions, specifications, collections
- Searchable - *for Definitions only!*
- Not impacted by workflow
- Recorded as System Event
- Travels with the version

Tags - Uses

- Ephemeral – *lasting for a short period of time*
- Operational classification purposes
 - Training
 - Small Batch Editing
 - Rabbit holes and spider webs
 - Custom Exports
- Governance classification – maybe not?
 - PII | FERPA | HIPPA
 - Bio/Demo
 - Prefer Additional Attributes? Pro/Con Gain control, loss of filter

Tags - Demo

- Enterprise –
 - Dan Helper quickly isolates examples for a Quality Demo across multiple objects (def, spec, collection) Org > Tags
 - Reggie Stration, a data steward, exports GPA-related definitions. Browse search GPA, add tags to 2 more definitions. Exports the set of 8.
 - Trainer – any user – uses Synonym tag to quickly list definitions that use synonym

Content Management and Standards

- Someone manage the Tag list – Organization > Tags
 - encourage deletion
 - forcible deletion
 - Add new Tags at this list
- Include Tag guidelines in written Standards or Training materials
 - Ephemeral nature
 - Content Manager may delete

Synonyms – Features

- Same for all license types
- Only Definitions
- Editor Permission
- Outside of Workflow
- Searchable
- Recorded as System Event

Synonym - Use

- Normal English language usage
- Acronym and abbreviations
 - Base on common usage, not absolute rule
 - Use Definition Label for most common phrase
 - Use the less common phrase as Synonym
- Do not use for a label you want to sunset.

Synonyms - Demo

Enterprise

- Reggie Stration – retrieves Course Number; adds CRN as synonym to an Approved definition
- Connie Sumer – views synonym, cannot edit

Attachments - Features

- Available for definitions, specifications, collections, and data systems
- Nearly any format
- Under workflow control
- All users see all attachments
- Size
 - 100 page PDF
 - 7 MB doc ~20 seconds to load

Attachments - Features - Enterprise

- Specification > Display Tab
 - Communicate how a report should look
 - Knowledge and EE use Attachment Tab
- Admin - Data System documentation
 - Documentation repository

Attachments - Use

- Policy or Usage
- Report Headers
- Visuals | Diagrams for complex definitions
 - Compare Applicant Status and Application Status
- Knowledge
 - Valid value lists

Demo – Knowledge (Trains.demo)

- Connie Summer views all Attachments
 - Valid Value lists - Major (Definition)
 - Report Header - Incoming Freshman Report (Specification)

Demo - Enterprise (Trainu.demo)

- Tech Nickles attaches system documentation (Editor permission)
 - Attach to a Data System *My Student Information System (SIS)*
 - Version the docs
- Jill Yun – report requester – Faculty Tenure Status
 - Changes display mode to Sample
 - Imports a report header

Coming Up

February 6 - Migrate to a New Workflow

As governance processes mature, it may be necessary to change a workflow that approves items in Data Cookbook. This session reviews the planning process and a demo for 2 ways to migrate items to a new workflow.

March 6 - Approaches to Technical Definitions

A technical definition identifies the location or calculation of a glossary definition within a specific data system. How much technical detail should be recorded? What about pre-existing technical repositories? This session reviews how to approach technical definitions so that your goals are met regarding technical metadata management.

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