

# Workflow Basics

Workflow Wednesday Series

January 31 - Basics

February 28 - Definitions

March 28 - Specifications

# Logistics

- 1<sup>st</sup> half of session is presentation and will be recorded
- 2<sup>nd</sup> 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

- **Brenda Reeb**

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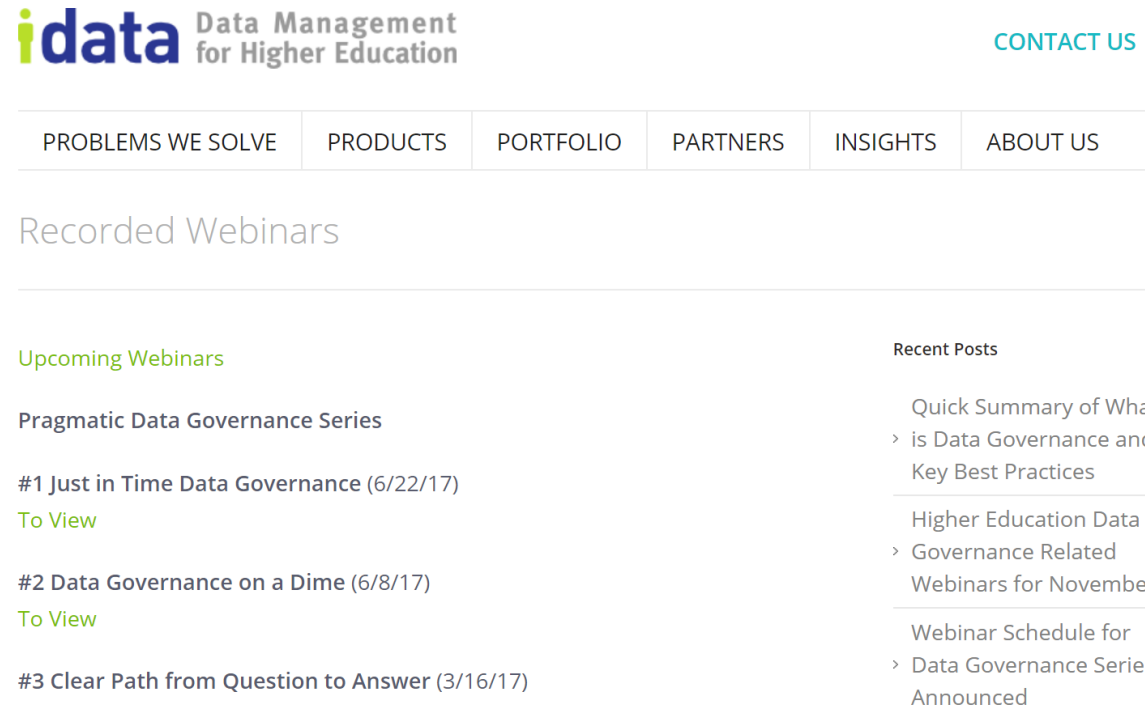
- **Jim Walery**

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# Recorded Data Governance Webinars

<http://www.idatainc.com/recorded-webinars/>



The screenshot shows the top portion of the iData website. On the left is the logo for 'idata Data Management for Higher Education', with 'idata' in blue and green and the tagline in grey. On the right is a teal 'CONTACT US' link. Below these is a horizontal navigation menu with six items: 'PROBLEMS WE SOLVE', 'PRODUCTS', 'PORTFOLIO', 'PARTNERS', 'INSIGHTS', and 'ABOUT US'. Underneath the menu is a section titled 'Recorded Webinars'. To the left of this section is a sub-section for 'Upcoming Webinars' listing three items from the 'Pragmatic Data Governance Series' with dates and 'To View' links. To the right is a 'Recent Posts' section listing three articles with titles and dates.

**idata** Data Management  
for Higher Education

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## Recorded Webinars

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### Upcoming Webinars

**Pragmatic Data Governance Series**

#1 Just in Time Data Governance (6/22/17)  
[To View](#)

#2 Data Governance on a Dime (6/8/17)  
[To View](#)

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

### Recent Posts

Quick Summary of What  
> is Data Governance and  
Key Best Practices

Higher Education Data  
> Governance Related  
Webinars for November

Webinar Schedule for  
> Data Governance Series  
Announced

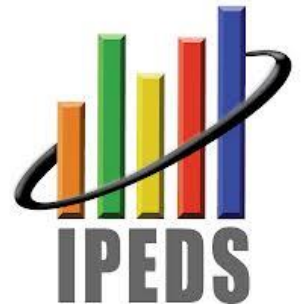
Upcoming webinars at: <http://www.idatainc.com/about-us/idata-webinars/>

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



## Common Data Set Initiative

*A collaborative effort between publishers  
and the educational community*



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- Send email to [marketing@idatainc.com](mailto:marketing@idatainc.com) if interested



# Agenda

- Welcome and Overview
- Anatomy of a workflow
- Roles and Permissions
- Advanced topics
- Build a workflow
- Versions
- Notifications
- Transition from default to custom



# Overview

- Purpose - Progress an Object from Drafting to Approve
- Customization available 2017
- Update with Versions
- 2 views
  - Role – do it
  - Administrator – build it
- Use same building block for all workflows
- Email notifications alert participants
- Requires Administrator permissions

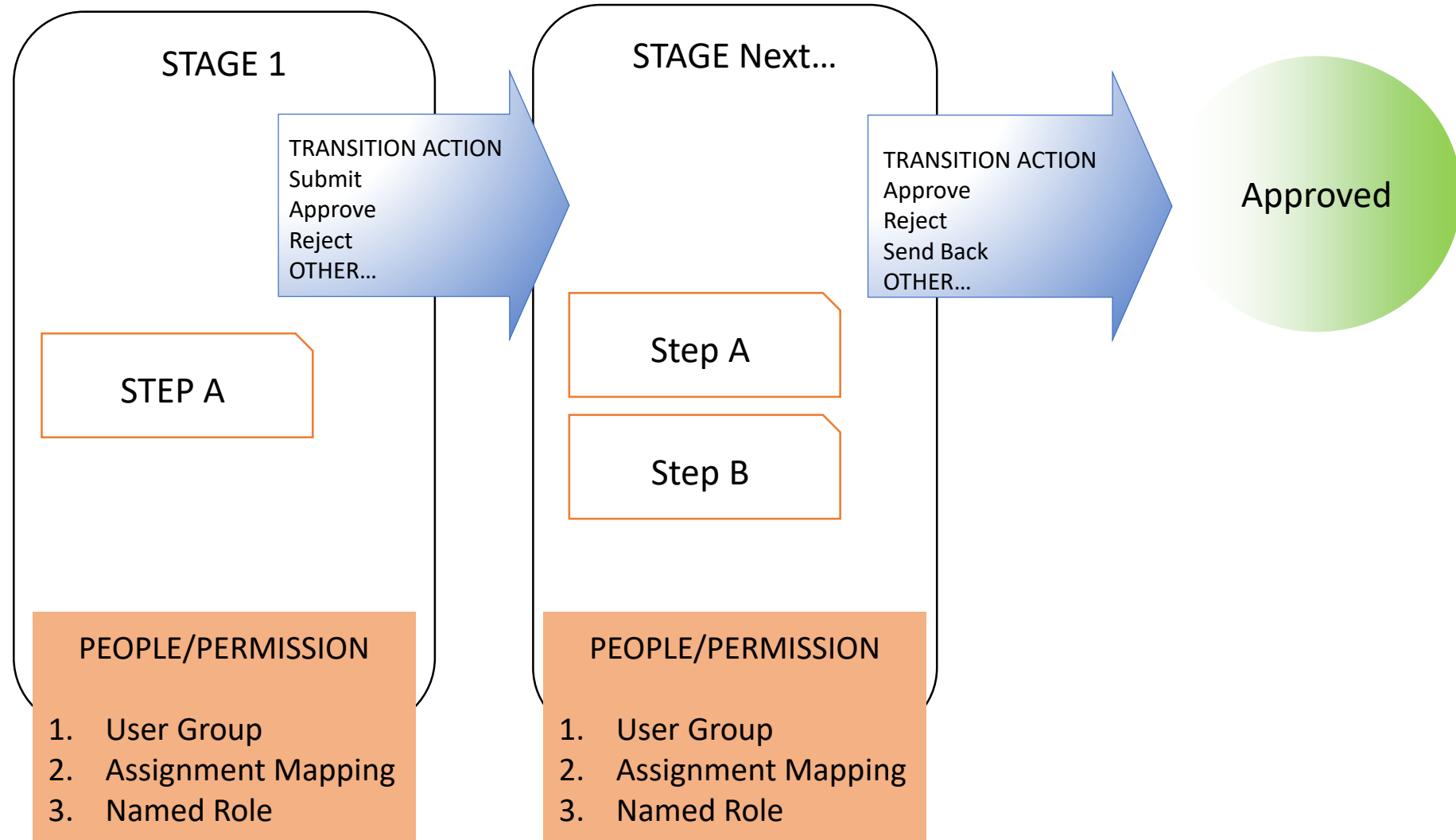
# 8 Workflows

1. Definition Approval
2. Specification Approval
3. Collection Approval
4. *Information Request Resolution*
5. Quality Rule Approval
6. Reference Data List Approval
7. *Quality Issue Resolution*
8. Quality Attribute Approval

# Demo Definition workflow

# Anatomy

- Stages
- Steps
- Transition Actions
- Add people



# Create a Stage

## Stages: ⓘ

Name	Initial Stage	Default Next Stage (Happy Path)	
<b>Drafting</b>	<input checked="" type="checkbox"/>	Approved	<span>show</span> <span>edit</span> <span>x</span>
<input type="text"/> - name. <input type="text"/> - background. <input type="text"/> - font color.	<input type="checkbox"/>	--Undefined--	<span>create</span> <span>cancel</span>

# Create a Step

Name: ⓘ

Description: ⓘ

Required: ⓘ

Generate Task Items: ⓘ

Users Required To Act: ⓘ Any All

Actions:

Allow Edit ⓘ

Allow Collaboration ⓘ

Timeout:  day(s) ⓘ

Stage Transition Actions: ⓘ

Approve

Reject

Back To Drafting

Groups: ⓘ

Mappings: ⓘ

Named Role: ⓘ

or [Cancel](#)

# Create a Transition Action

Name: ⓘ

To Stage: ⓘ

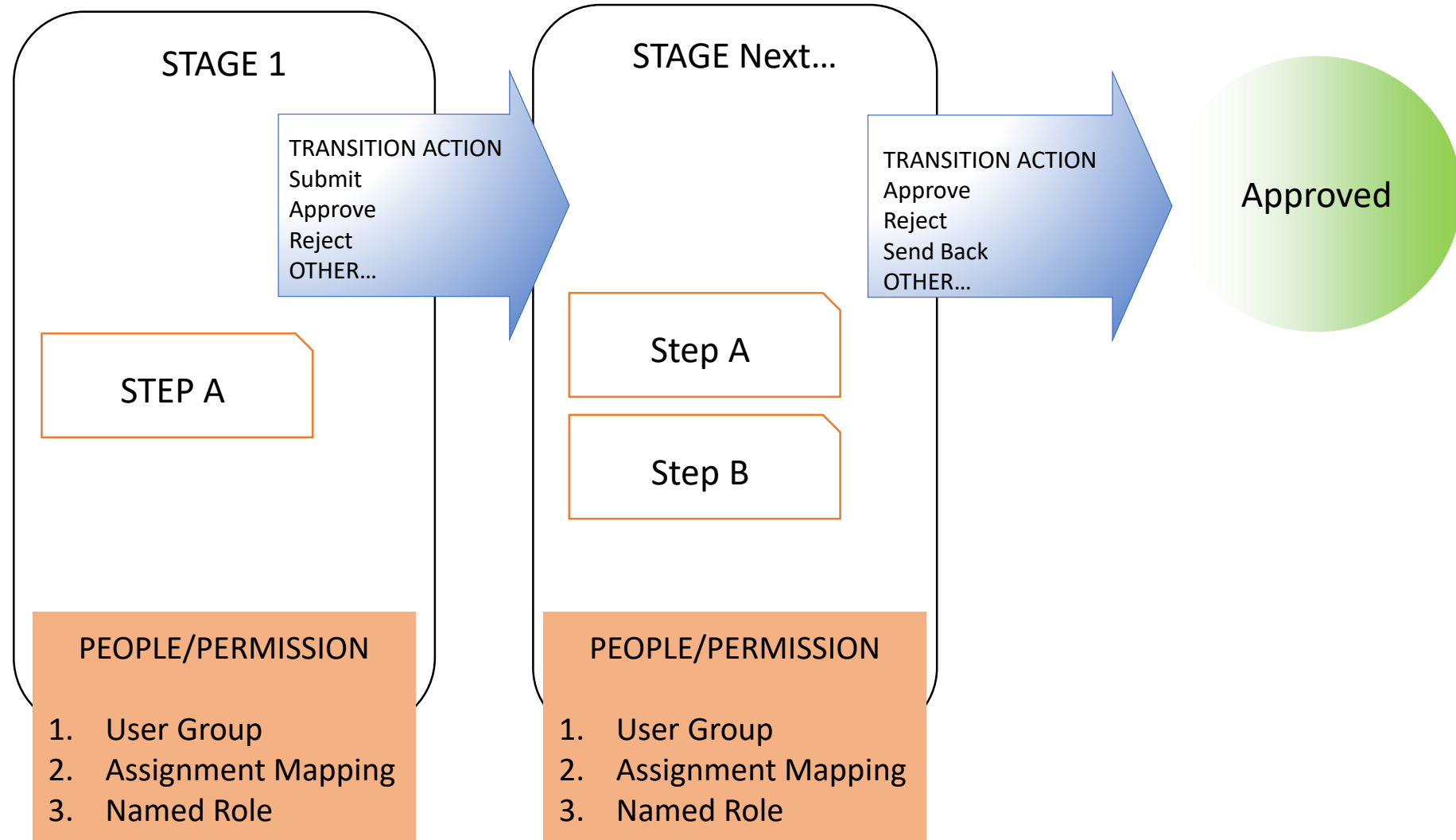
Happy Path: ⓘ  Override: ⓘ

Entry Point: ⓘ

[Cancel](#)

# Anatomy

- Stages
- Steps
- Transition Actions
- Add people





# Roles and Permissions

- 3 Ways to add people
- All User Group based
- Permissions
  - Need User Group Editor to Create
  - Edit and Collaborate by invitation
  - Approve via Transition Action, not User Group Permission

# 3 Ways To Add People

## 1. User Group

- Free for all – grab it!

## 2. Assignment Mapping

- Object automatically routed to a user group by an attribute
  - Functional area
  - Data System
  - Specification type
  - Classification code

## 3. Named Role

- Manager (first user group) assigns object to a worker (second user group)

# User Group



Use Case: small group with same expertise; highly collegial groups; governance groups

## User Groups

### Administrators

Members of this group have administrative privileges.

USERS (10)

[Dolly Sign](#)  
[Ginny Job](#)  
[Lettie Mein](#)  
[Lisa Lang](#)

[Marci Money](#)  
[Reese Urcher](#)  
[Reggie Stratton](#)

[Sally Admin](#)  
[trains IData Admin](#)  
[Travis Flight](#)

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### All Users

This is the default group that will be assigned to every user in your organization as they are created. It cannot be removed from a user. This group can be granted additional permissions that will apply to every user within your organization.

USERS (31)

Default Group - it contains every user automatically.

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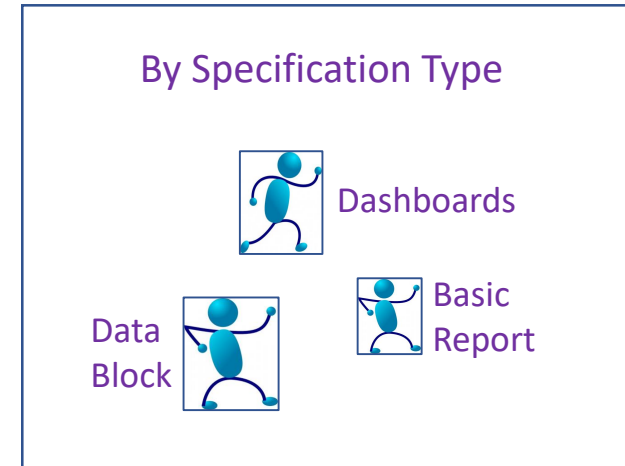
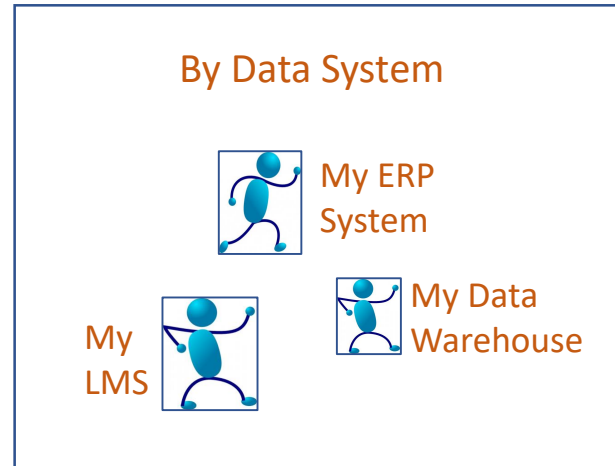
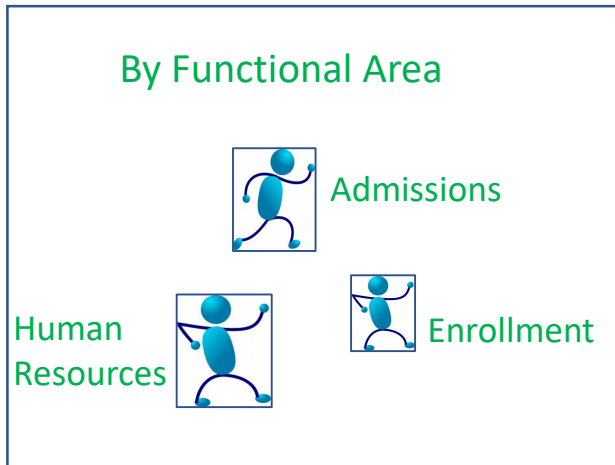
### Data Security Expert

Users in this group have editor permissions to definitions in the Human Resources functional area.

USERS (1)

[Ginny Job](#)

# Assignment Mapping



Use Case: auto route by attribute; same task, different area

# Data Stewards by Functional Area

[Edit](#)[Back to All Assignment Mappings](#)

## Description:

This assignment mapping identifies the different groups that will moderate definitions based on their functional area.

## Workflow Attribute Type:

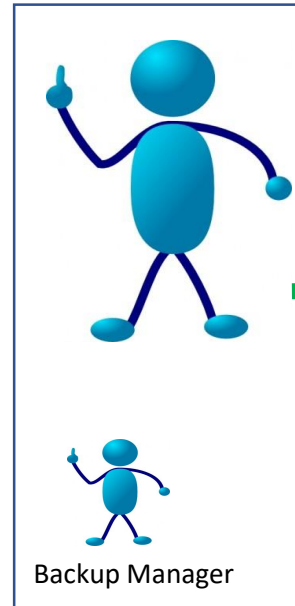
Functional Area

## User Groups: [Edit](#)

Functional Area	Users Groups
Training System of Universities	<a href="#">Special Data Stewards</a>
Admissions	<a href="#">Data Stewards - Admissions</a>
Advancement	<a href="#">Data Stewards - Advancement</a>
Enrollment	<a href="#">Data Stewards - Enrollment</a>
Finance	<a href="#">Data Stewards - Finance</a>
Financial Aid	<a href="#">Data Stewards - Financial Aid</a>
Human Resources	<a href="#">Data Stewards - Human Resources</a>
Information Technology	<a href="#">Data Stewards - Information Technology</a>

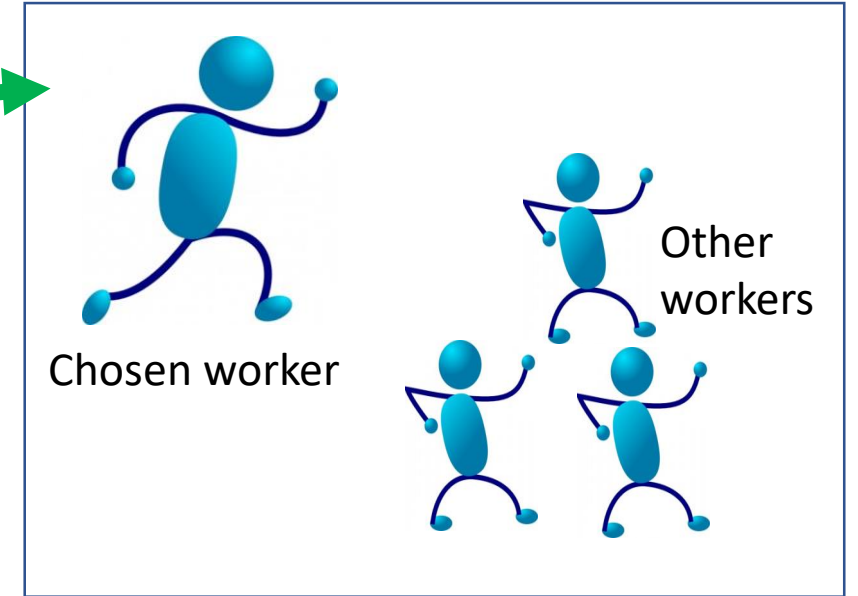
# Named Role

Person A in  
User Group A



User Group A  
a. Report Manager  
b. Standards Manager

Person B in  
User Group B



User Group B  
a. Report Writer  
b. Standards Expert

Use Case: highly personal; manage  
workload within peer group;

# Assign Report Writer

Edit

[Back to All Named Roles](#)

## User Groups to be selected from

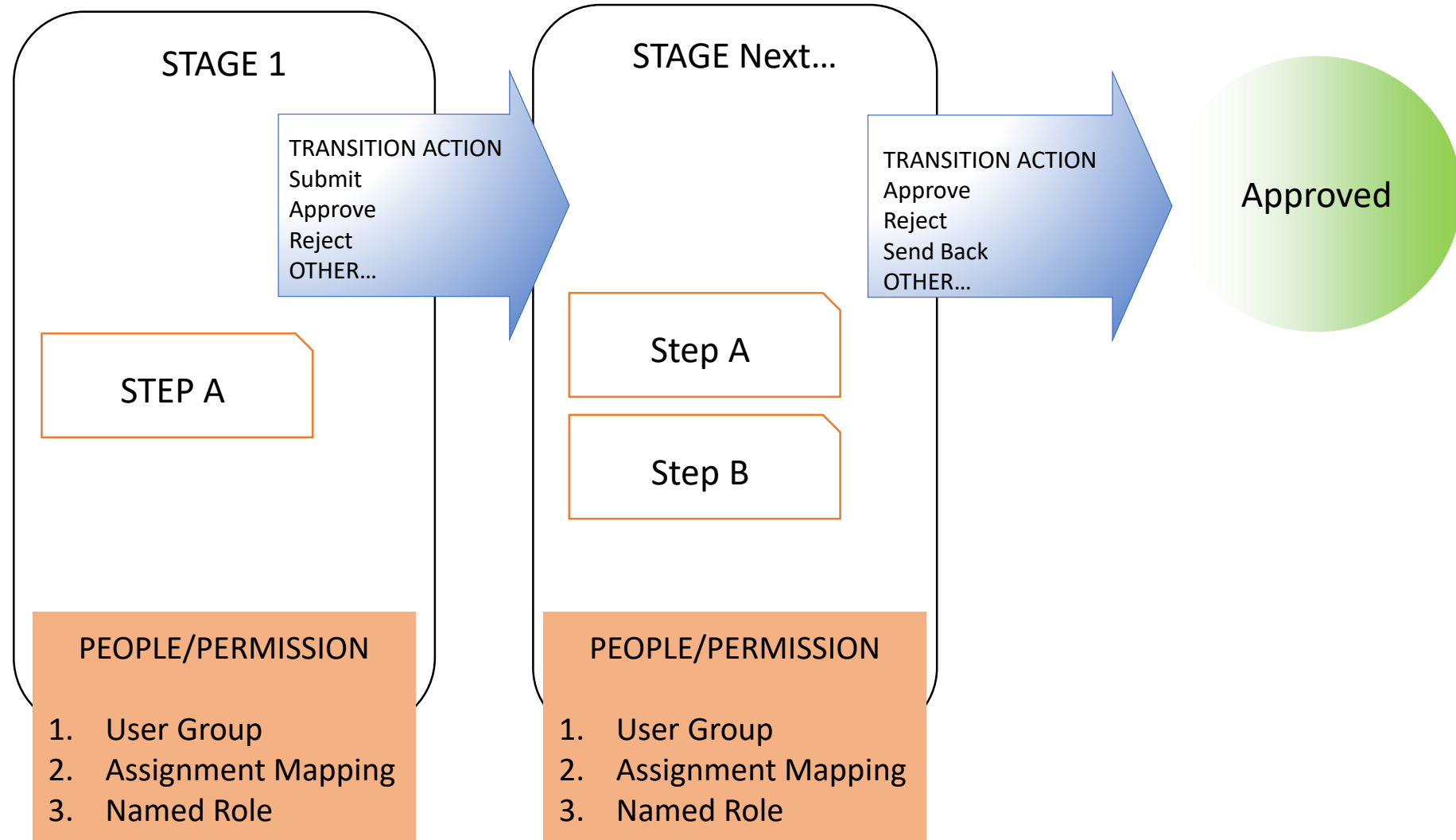
User Group Name	Users Count
<a href="#">Report Writers</a>	3

## User Groups that will make the selection

User Group Name	Users Count
<a href="#">Specification Managers</a>	1


# Anatomy

- Stages
- Steps
- Transition Actions
- Add people





## Email to *Specification Manager User Group* members

 **Data Cookbook** via amazonses.com 10:  
to me ▾


[Faculty Appointment Status - System wide](#) - is now in the stage: "In progress". You can assign named role: "Specification Assignee".

Requested by Don Nation. Last updated on Tue, May 30 at 10:19AM

ID: 23689

SUMMARY: Don Nation requested specification Faculty Appointment Status - System wide

## Email to *Assignee* in Report Worker User Group

 **Data Cookbook** via amazonses.com 10:16 AM  
to me ▾

[Faculty Appointment Status](#) - is now in the stage: "In progress". And you have been assigned to the step: "In Progress".

Requested by Don Nation. Last updated on Tue, May 30 at 10:14AM

ID: 23688

SUMMARY: Don Nation requested specification Faculty Appointment Status

# Build Steps

- Sketch
- Build
- Activate
- Order
- Test
- Revise
  - Some revisions require new version

# Sketch a Definition Workflow

- Drafting
- Data Steward Review
  - Assignment Mapping by Functional Area
- Technical Editor - technical definition
  - Assignment Mapping by Data System
- Standards Review
  - User Group
- Approval

# Build a Specification Workflow

- Proxy Request a Report
- Assign

# Advanced Topics

- Steps in detail
  - Required
  - Any/All
  - Actions – Edit/Collaborate
  - Timeout
- Transition Actions in detail
  - Override
  - Entry Point

# Repeat Demo from Definition side

- Stage and Step names
- Transition Actions
- Edit/Collaborate
- Version

# Tips

- Draw then quickly build
- Order of build:
  1. Stages
  2. Create Groups, Assignment Mappings, Named Roles
  3. Transition Actions
  4. Steps
- Use simple, concrete labels
- Show it to participants and revise
- Multiple versions are good; multiple workflows not so much

# Get More Help



- Support – [support@datacookbook.com](mailto:support@datacookbook.com)
- Administrators Guide and User Guide
- Forum



# Workflow Wednesday Series



- Workflow Wednesdays 3 PM EST
  - #2 February 28
    - Definition Approval Workflow
  - #3 March 28
    - Specification Approval Workflow

Thank you!



Extra slides

# Definitions: Examples of User Groups, Assignment Mapping, Named Role

