

# Workshop Wednesday Specification Approval Workflow

## Workshop Wednesday Series

January 31 - Basics

February 28 - Definitions

**March 28 - Specifications**

Changes:

Deleted Community slide

# 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



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# Recorded Data Governance Webinars

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## Recorded Webinars

### 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/>

# 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](mailto:marketing@idatainc.com) if interested

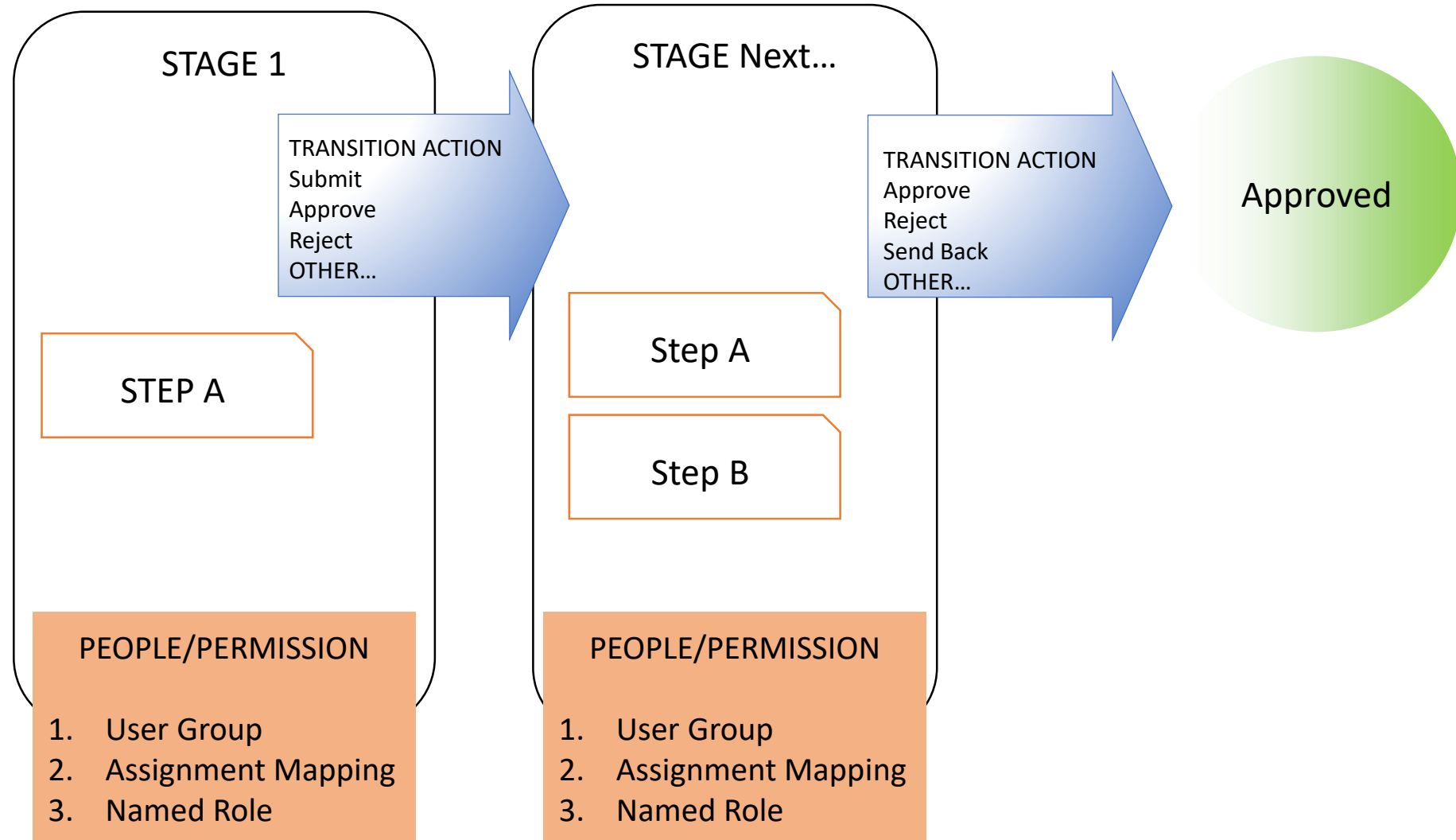


# Agenda

- Quick Anatomy Review
- Examples
- Key Design Features
- Versions
- Q&A

# Anatomy

- Stages
- Steps
- Transition Actions
- Add people
  - User group
  - Assignment Map
  - Named Role
- Conditional



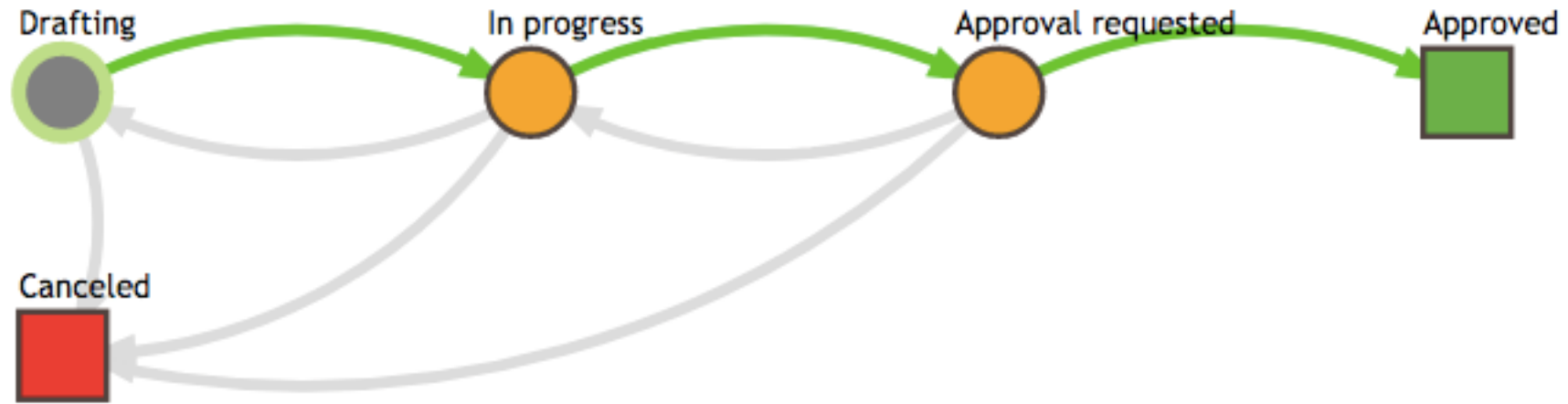
# Assign people

- 3 ways to assign people:
  - User Group (fight over it)
  - Assignment mapping (auto route by Func Area, Data System, Spec Type)
    - Example Technical Editors By Data System
  - Named Role (Person A selects Person B)
    - Specification Assignee



6 examples

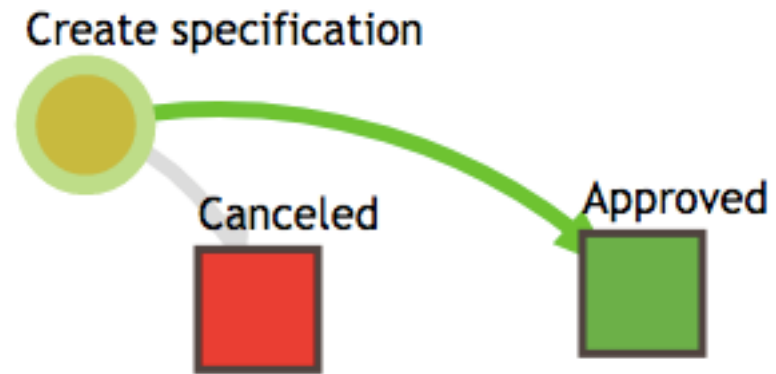
# Example 1 - Default



# Design details

- In Progress Stage: Named role – Manager assigns to staffer
- 2 things happen in In Progress
  - Make assignment
  - Staffer builds report

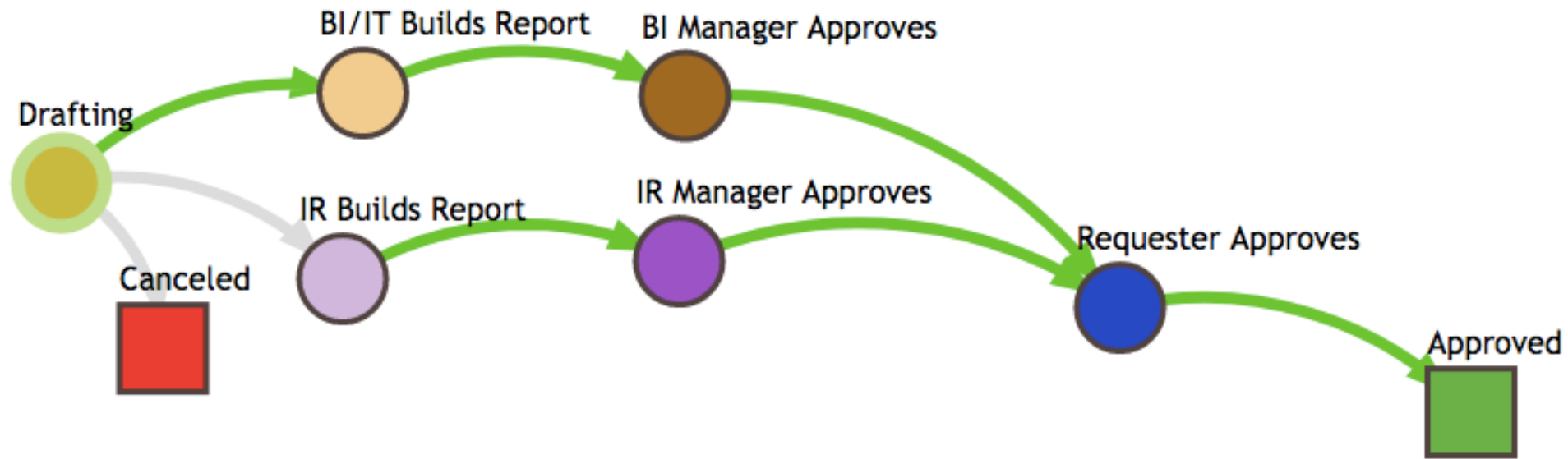
# Example 2 – Catalog existing reports



# Design details

- 1 person
- Good choice for quick approval of a backlog of pre-existing reports
- Allows you to easily communicate “Approved”

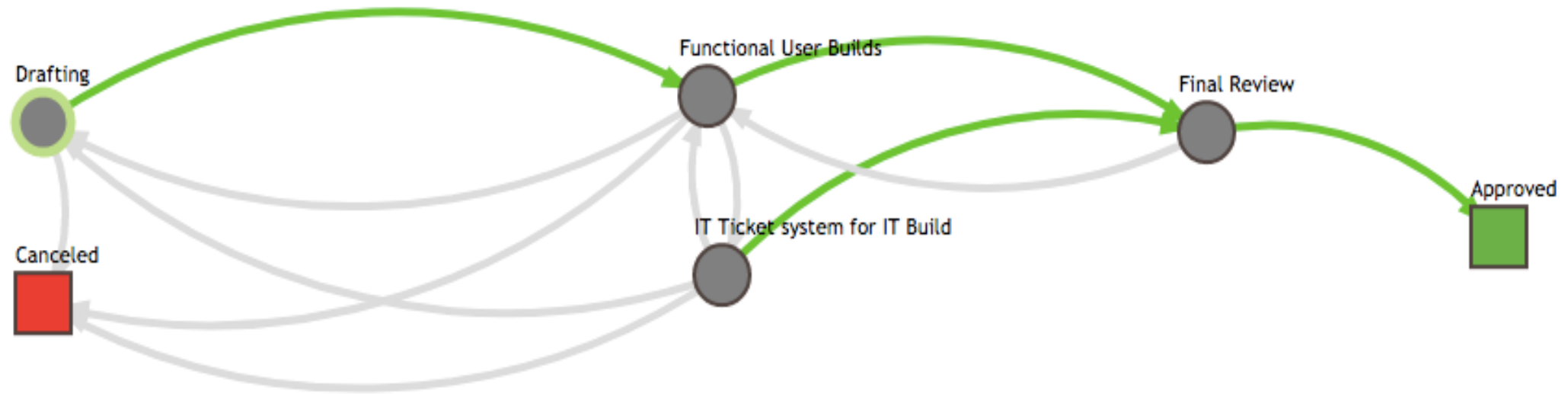
# Example 3 – Split build, smart Requester



# Design details

- Requester must choose correctly
  - Frequent user
  - Aware of larger data environment
- Uses simple user groups for role assignments
- Spec Example in Demo
  - Student Athletes by Major (login as creator Jill Yun)

# Example 4: Split build, Requester can't decide

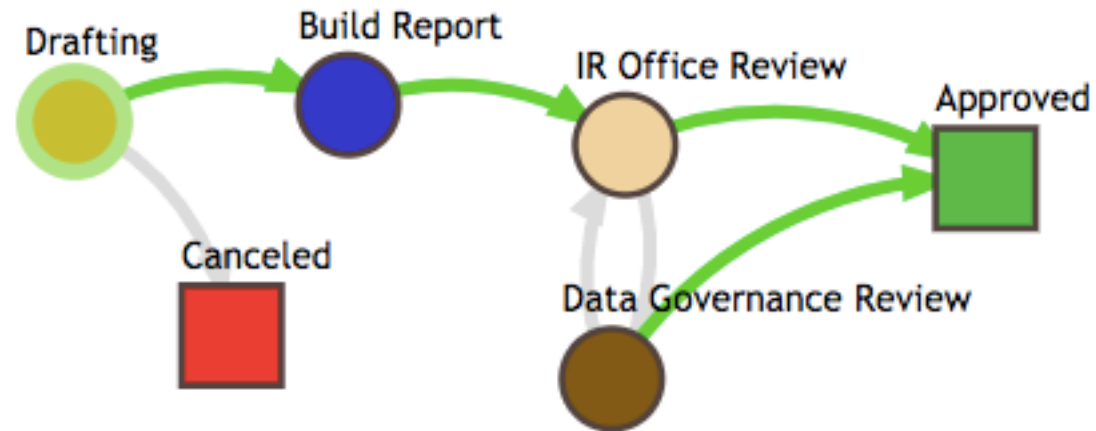




# Design details

- Requester has 1 path – to submit to IR
- IR staff manually re-assign to IT if needed
- 80% requests will go to IR, so that is the Happy Path

# Example 5 – Ad hoc DG review



# Design details

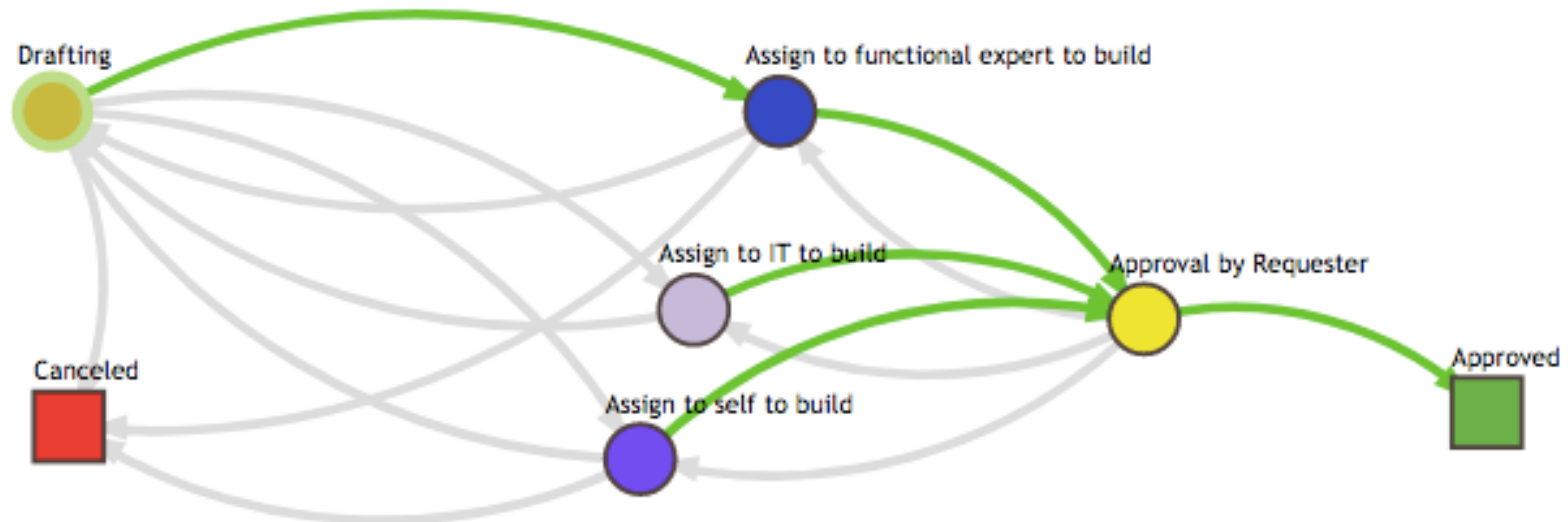
- IR staff knowledgeable about when to refer to DG group
- No Requester approval because Requester is a report writer, not an end consumer
- DG can approve or return to IR
- Build Stage – people assignment is ambiguous. Could be a user group, an assignment mapping, or named role. Your choice.
- “Caboose” style

# Example 6 - Conditional allows approval variation

Conditions: ⓘ

Specification Type is Role or Position-Specific Use

Diagram: ⓘ



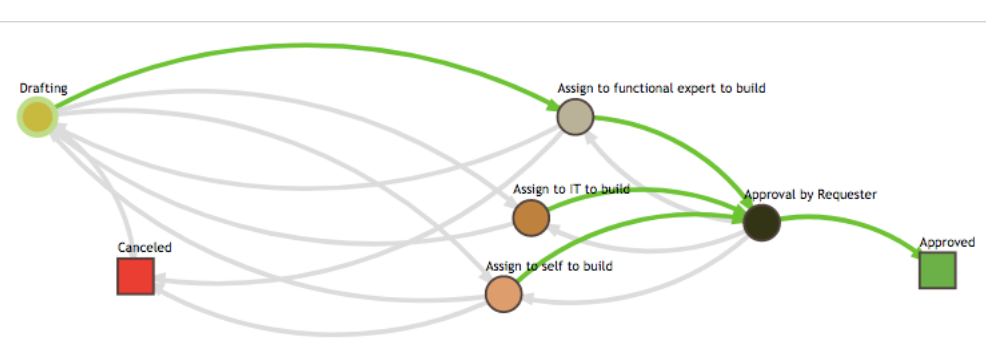
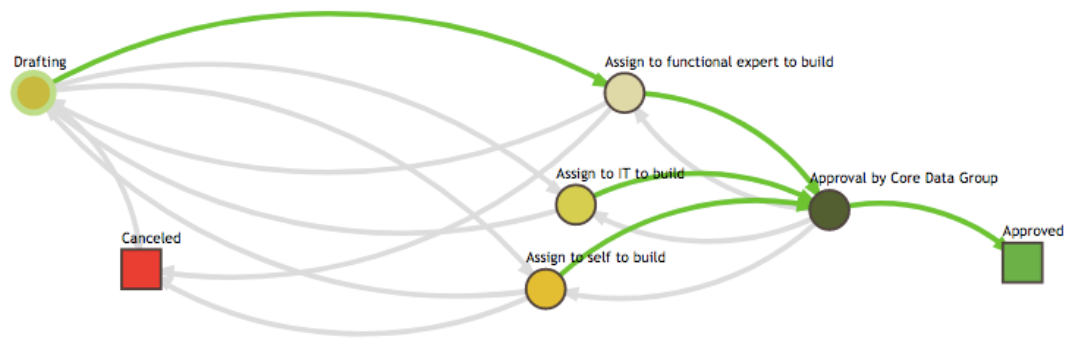
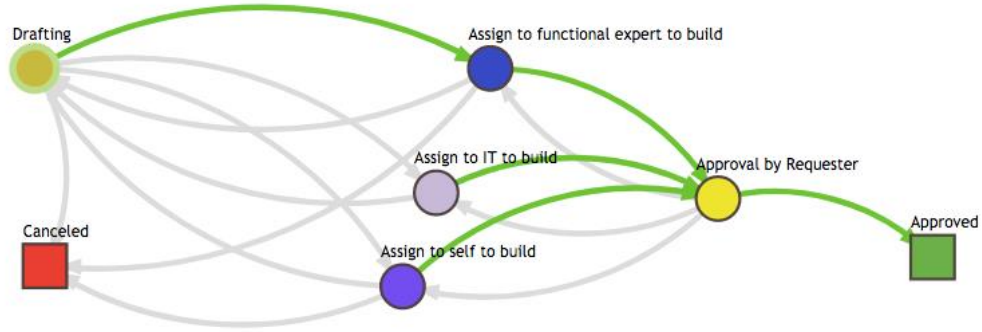
# Example – Spec type as conditional

<b>Ad Hoc Use</b> <a href="#">Edit</a> <a href="#">Delete</a>	Reports generated on an ad hoc basis for an individual or group. Ephemeral and informal, usually a 1-time purpose.
<b>Cross Department Use</b> <a href="#">Edit</a> <a href="#">Delete</a>	Reports in this group are used by multiple departments and contain data from multiple data domains.
<b>Department Use</b> <a href="#">Edit</a> <a href="#">Delete</a>	Reports used within a single department, using data within that department.
<b>ODS View</b> <a href="#">Edit</a> <a href="#">Delete</a>	This specification type describes a view in the ODS Data System
<b>Role or Position-Specific Use</b> <a href="#">Edit</a> <a href="#">Delete</a>	Reports for use by a specific role or position, such as Executive Director of HR. Or Registrar. When an individual vacates a role, the next individual in that position would want to see the report. These reports tend to be more detailed than reports used at the department level.

Conditions: ⓘ

Specification Type is Role or Position-Specific Use

Diagram: ⓘ

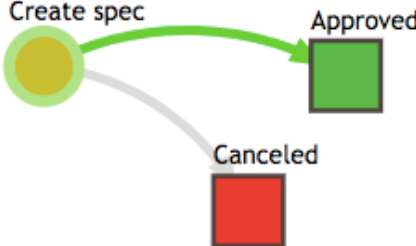


Request process – 3 ways

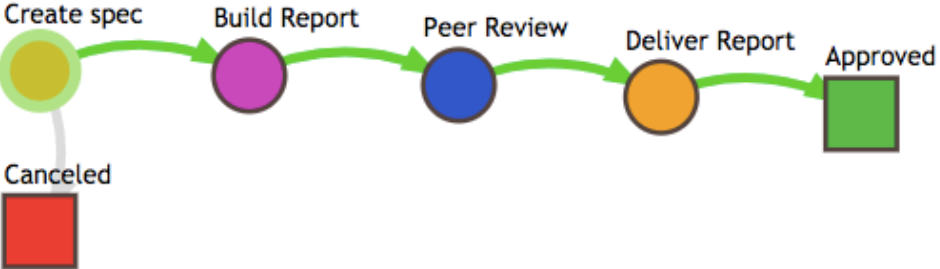
# Variation on Request Process – 3 ways

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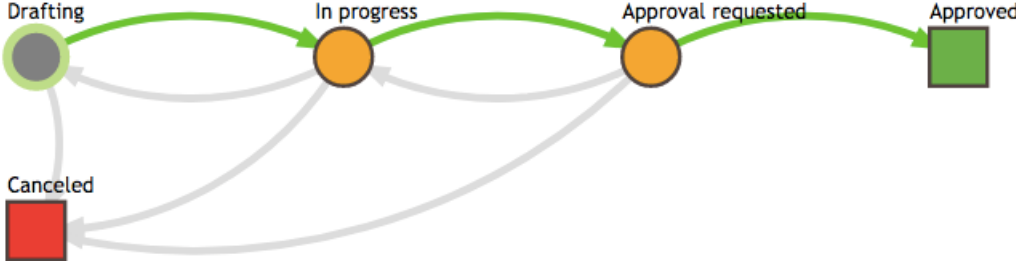
Pre-existing ticket system



Hybrid



Exclusive Data Cookbook





# Summary - 3 Processes within a Spec Workflow

## Request

- ✓ Data Consumer
- ✓ Expert Data Consumer
- ✓ Report writer

## Build

- ✓ 1 department
- ✓ Multi core departments
- ✓ Distributed by business area

## Approve

- ✓ Requester
- ✓ IR/BI offices
- ✓ DG Groups

# Review key design features

- Workflow panel
  - Stage names | Transition Actions
- Conditionals
  - Functional Area
  - Specification Type
  - Data System
- Workflow selection – Workflow selected based on listing order on Workflow List page
- More complicated than Def workflow; less training due to better control of participants
  - 3 processes together
    - Request process
    - Create a report
    - Approve

# More key design features:

- Auto-assigned, based on list order and conditionals
- Triggering a conditional during process automatically selects conditioned workflow and restarts process with conditional workflow
- Collaborate
  - View | Edit | Do my job
- 1 Happy Path exiting Stage; multiple Alternative paths. Happy path can pick up from an Alt Path and converge into another Stage.

# Versions

- Tasks that force a new version
  - New Stage
  - New Step
  - Change All/Any within a Step
  - Change Entry Point or Override within a Transition Action
  - Conditional
- Tasks that do NOT force a new version
  - Change labels or descriptions
  - Check/Uncheck Required
  - Create new Transition Actions or edit existing
  - Swap User Groups, Assignment Mapping, or Named Role
  - Change users within user groups

# Q&A and Get Help



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

# Workshop Wednesday Series

- Workshop Wednesdays 3 PM EST
  - #3 March 28
    - Specification Approval Workflow
  - #4 April 25
    - Collections
  - #5 June 6
    - Data Request Process – 3 Ways with Specs

Thank You!