

# How to Import Definitions

The Import Definition feature saves time when you want to add or update a large number of definitions. This session reviews the import process, user permissions, and use cases that expedite the process of adding or updating definitions.

Workshop Wednesday #14

February 26 2020

# 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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  - IData, Director of Marketing
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# Welcome

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

Workshop Wednesdays on the horizon - 2PM EST

- March 18 @2pm EST: User Permissions 101
- April – See you at HEDW and other conferences
- May 20 @2pm EST: Managing Reference Data
- June 17 @2pm EST: Tips to Manage Content

# Data Cookbook Help Page



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# Training Resources



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## Help

### Training Resources

| Resource                                     | Description   |
|--|---|
| <a href="#">Just-in-Time-Training Videos</a> | 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.  |
| <a href="#">Workshop Wednesdays</a>          | 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. |
| <a href="#">Recorded Public Videos</a>       | Previously recorded webinars on various presented by IData that cover the Data Cookbook and Data Governance related subjects.   |
| <a href="#">Upcoming Public Videos</a>       | View the schedule of upcoming Data Cookbook and Data Governance webinars.   |

# Support

| Support                                       |   |
|---|---|
| Resource                                      | Description   |
| <a href="#">Email Support</a>                 | 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   |
| <a href="#">Extra Data Cookbook Resources</a> | Find additional client resources from Data Cookbook knowledge base for using and implementing the Data Cookbook.  |
| <a href="#">Questions and Support forum</a>   | Browse questions asked by other users or post your own questions about how to work with the Data Cookbook.  |
| <a href="#">System Announcements Forum</a>    | Find important announcements from the Data Cookbook development team, including information on recent updates to the application as well as planned outages |

# Documentation

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## Documentation

| Document                                       | Last Updated | Description  |
|--|--------------|--|
| <a href="#">User's Guide</a>                   | 11/19/2019   | Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.  |
| <a href="#">Administrator's Guide</a>          | 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 workflows.  |
| <a href="#">External Authentication</a>        | 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. |
| <a href="#">Test Instances</a>                 | 08/21/2019   | Reference documentation for administrators and users who are working in the Test Instance of the Data Cookbook.  |
| <a href="#">Metrics Dashboard</a>              | 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.   |
| <a href="#">Private Community User's Guide</a> | 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   |

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# More Support:

- Pop Up Help within Data Cookbook (triangle in lower right corner)
- Ask clients – Post to *Questions and Support* in the Forum

Training University Enterprise Plus

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## Public Forums

| Forum  | Topics | Posts | Last Post  | Watched?              |
|--|--------|-------|--|-----------------------|
| <div>70</div> <a href="#">Data Cookbook News</a> 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.                                      | 71     | 85    | 14 days ago<br><b>In:</b> Next Data Cookbook Workshop Wednesday is...<br><b>By:</b> Jim Walery - IData Incorporated          | <a href="#">Watch</a> |
| <div>115</div> <a href="#">System Announcements</a> Important announcements from the Data Cookbook development team. This includes information on recent updates to the software as well as planned outages.<br><a href="#">Follow us on Twitter for News an</a> | 116    | 155   | 3 months ago<br><b>In:</b> November 2019 Release<br><b>By:</b> Aaron Walker - IData Incorporated                             | <a href="#">Watch</a> |
| <div>216</div> <a href="#">Questions and Support</a> This forum is for any questions about how to work with the Data Cookbook. For direct, personal support use <a href="mailto:support@datacookbook.com">support@datacookbook.com</a>                           | 216    | 742   | 8 days ago<br><b>In:</b> Functional Areas List Very Difficult to ...<br><b>By:</b> Kristina Harvey - Simon Fraser University | <a href="#">Watch</a> |
| <div>11</div> <a href="#">Reporting Tool Integrations</a> Use this forum to discuss tips and techniques for integrating the Data Cookbook with your reporting tools. See the <a href="#">Integrations</a> page for more ideas.                                   | 11     | 31    | 11 months ago<br><b>In:</b> HTML customizations for pop-up<br><b>By:</b> Kristina Harvey - Simon Fraser University           | <a href="#">Watch</a> |
| <div>5</div> <a href="#">Data Systems</a> Use this forum to discuss any general practices for documenting data systems. Typically, these represent physical systems like ERP databases, warehouses, reporting databases, etc. Share your ideas on these.         | 5      | 20    | 7 months ago<br><b>In:</b> Using Workday ERP and Data Cookbook<br><b>By:</b> Cutler, Cynthia - Florida Gulf Coast            | <a href="#">Watch</a> |

# Agenda

- Definitions – New and Re-import
- Fundamentals
- Permissions
- Use Cases

# Definitions

- Your stuff
  - New
  - Export / Import
- Community
  - Possible but out of scope for this webinar

# Steps

1. Check Permissions
  - a. Admin – Automatically Approve
  - b. Manager
  - c. Editor
2. Prepare file using Import Template
3. Preview
4. Fix Errors
5. Accept and Import

# Fundamentals – Demo import new definitions

- Login as John Admin and import 10 definitions
  - Spoiler Alert - Use corrupted file first to show errors
  - Note duplicate in yellow
  - Wiki links for existing definitions are made
  - Missing Definition links are made if new

# Detailed look at Import Templates

- Display visual
- Picky
- View in text editor to catch hidden characters
- Add additional Technical Definitions – 3 columns
- Download file; sample file

# Permissions

- Editor
- Manager
- Administrator

# Use Cases

1. Import new
2. Import new, unaware of a duplicate
3. Export / Import
  - a. Bulk edits
  - b. Utilize new workflow
  - c. Add technical definitions



# Overwrite or Not

| Definition                    | Overwrite  | Do Not Overwrite                   |
|-------------------------------|--|------------------------------------|
| Approved                      | New version; edits reflected   | New version                        |
| In Progress                   | Edits reflected  | No change                          |
| HTML format Approved          | New version; lose HTML; edits reflected                                    | New version; format preserved      |
| HTML format In Progress       | Edits reflected; lose HTML   | No change                          |
| Quality Attribute Approved    | New version; edits reflected; Quality not preserved                        | New version; Quality not preserved |
| Quality Attribute In Progress | Changes reflected; lose Quality in prior and new versions; edits reflected | No change                          |

# Overwrite or Not

| Definition  | Overwrite  | Do Not Overwrite                   |
|---|--|------------------------------------|
| Approved (Actual Financial Aid)                   | New version; edits reflected   | New version                        |
| In Progress (Academic Advisor)                    | Edits reflected  | No change                          |
| HTML format Approved (Academic Rank)              | New version; lose HTML in prior and new versions; edits reflected          | New version; format preserved      |
| HTML format In Progress (Academic Calendar)       | Edits reflected; lose HTML   | No change                          |
| Quality Attribute Approved (Admit Type)           | New version; edits reflected   | New version; Quality not preserved |
| Quality Attribute In Progress (Academic Division) | Changes reflected; lose Quality in prior and new versions; edits reflected | No change                          |

Summary: Use Do Not Overwrite when you want to version duplicates in bulk. Use Overwrite to commit global edits. What is more work – replacing HTML or Quality Attributes, or manually editing 150 definitions?

# Summary

- Use the Import Template
- Admin users can Approve upon Import
- Troubleshoot template with text editor
- Use Overwrite carefully
- Plan Export / Import carefully
- More details in Admin and User Guides

# Be Part of the Community



[community.datacookbook.com](http://community.datacookbook.com)

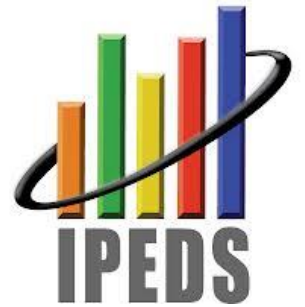
- Open to everyone
- Content from regulatory agencies and other institutions.
- Data definitions, Specifications, Contact information, Documentation



**Common Data Set Initiative**

*A collaborative effort between publishers  
and the educational community*

**NSLDS**



Watch for your community forum news emails

# News Updates

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## News, Updates, & Social Media

| Resource                              | Description  |
|---------------------------------------|--|
| <a href="#">Data Cookbook News</a>    | 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. |
| <a href="#">IData News</a>            | Browse the latest public news and announcements from the Data Cookbook website   |
| <a href="#">Twitter</a>               | Follow us on Twitter!  |
| <a href="#">IData YouTube Channel</a> | Find content recorded by IData experts on Data Governance topics   |

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## Additional Resources

| Resource                             | Description   |
|--------------------------------------|---|
| <a href="#">Data Cookbook Forums</a> | Browse all the Data Cookbook Community forums.  |
| <a href="#">Data Insights Blog</a>   | See the latest blog postings from our staff on various subjects including Data Cookbook and Data Governance |

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# Workshop Wednesday 2019-2020

- Purpose: Fun and Feature Focused
- Upcoming Dates and Topics:
  - March 18 @2pm EST: User Permissions 101
  - May 20 @2pm EST: Managing Reference Data
  - June 17 @2pm EST: Tips to Manage Content
- 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

# Data Governance Resources Page

## Data Governance Resources

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### Recorded Webinars

IData experts have recorded an entire webinar series on pragmatic data governance including [Overview](#).

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### Upcoming Webinars

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

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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.

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### 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.

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



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Contact us at [marketing@idatainc.com](mailto:marketing@idatainc.com)

# 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

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  - 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

