

# Tips to Manage Data Cookbook Content



Using tools within Data Cookbook, learn tips on managing the quality of content within Data Cookbook. Learn how to clean up Tags or Missing Definitions, update URLs embedded in definitions, and identify objects that are stuck within a workflow.

If you are a Content Manager, this is your task list.

Workshop Wednesday #17

June 24 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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# Welcome

Say Hi in Chat – institution, what you want to learn about today

Workshop Wednesdays on the horizon - 2PM EST

July / August - Summer break

Series returns in September

# Data Cookbook Help Page



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**data**  **cookbook**®

Quick definition lookup...

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[Specifications](#)

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ACTING AS ADMINISTRATOR

What information are you looking for?

Search the Data Cookbook

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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

## Documentation

Document	Last Updated	Description
<a href="#">User's Guide</a>	06/23/2020	Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.
<a href="#">Administrator's Guide</a>	06/23/2020	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



# Ask your Peers

Post to *Questions and Support*  
in the Forum

Training University Enterprise Plus

[John Admin \(Log out\)](#) [Help](#) [Recent Updates](#)  
[Turn Off Admin](#)

datacookbook

Quick definition lookup...

Home

Definitions

Specifications

Quality

Data Systems

Organization

Community

ACTING AS ADMINISTRATOR

☐ Public

☐ K-12

☐ Higher Education

Search:  >

# Pop up Help in Context

Pop Up Help within Data Cookbook (triangle in lower right corner)

The screenshot displays the 'Data Cookbook' website interface. At the top, there's a navigation bar with links for 'John Admin (Log out)', 'Help', 'Local Support via ZenDesk', 'Recent Updates', and 'Turn Off Admin'. The main header includes the 'datacookbook.' logo and a search bar. Below this is a navigation menu with 'Home', 'Definitions' (highlighted), 'Specifications', 'Quality', 'Data Systems', 'Organization', and 'Community'. A yellow banner indicates 'ACTING AS ADMINISTRATOR'. The 'Definitions' section features a search bar, sorting options ('Sort by: -- Select --', 'Display: Full Content'), and filtering options ('Filter by: -- Workflow definition --', '-- Functional Area --', '-- Definition Source --'). It shows 'Displaying definitions 1 - 50 of 439 in total' with pagination links. A definition for 'academic advising' is visible, with a description: 'A process that assists students in the clarification of the...'. A pop-up window titled 'How can we help you?' is overlaid on the right side, containing a search bar and a list of categories: 'General', 'Working with Definitions', 'Working with Specifications', 'Quality Items', 'Administrator Functions', and 'Learn more about ...'. A blue arrow points from a 'Need Help?' triangle in the bottom right corner to the pop-up window.

# Workshop Wednesday Agenda

1. Manage Tags
2. Manage Missing Definitions
3. Update URLs embedded in definitions
4. Report on your account via ODBC
5. Identify objects that are stuck within a workflow
6. Use a Standards stage in some workflows
7. Use a Step in some Stages to allow a Content Manager to take action
8. Designate a Content Manager

# 1. Manage Tags

- Key Review
  - Assigned to definitions and specifications
  - Browse filter
  - Added at object and at master list
- View Tag list
- Delete outdated tags
  - From object
  - From master list – only if tag originally created through an object
- Communicate a Usage Policy
  - See Help Text

## 2. Manage Missing Definitions

- Key review (see definition Meal Plan)
  - Create a wiki link within a functional definition to a word or phrase that has not been created yet; it's a placeholder. To view: select Missing Definitions on Definition menu
- Monitor for age; sort by Create Date
- Complete or Delete
- Definitions can be approved with placeholders still active. See definition Complete Online Course

# 3. Manage URLs embedded within Definitions

- Key review
  - URLs may be embedded in any text box.
  - Points to additional information published internally or externally
  - See definition Visa Classification
- Process:
  - Use systematic preface: See URL: <https://blah.blah>
  - Schedule review – quarterly, semiannually, etc
  - Keyword search all text boxes per schedule

## 4. Report on your account via ODBC

- Key Review
  - Request it
  - Use your own reporting tool
- 15 views – documented as Specifications in Community
- 5 Sample views:
  1. User activity: views
  2. Custom fields: usage
  3. Definition comments
  4. Which definitions and specifications undergo multiple versions
  5. View all open Tasks

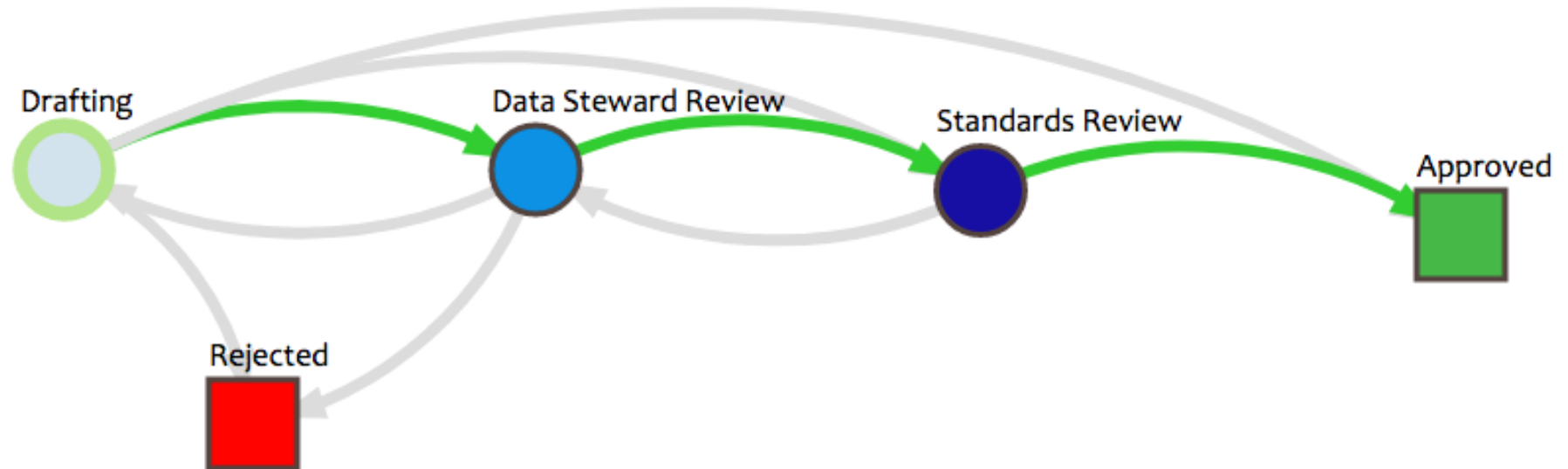
# 5. Identify objects stuck within workflows

- Key Review
  - Queue
    - Filter rows
    - Uncheck Available for action by me
- Filter by workflow stage
  - Definition > Workflow with tech def > Data steward review
- Filter by Originator
- Sort – Date Started (simple)



## 6. Use a Standards Review stage in every workflow

- Maintain editorial control
- Maintain correct usage



# 7. Use a Step in some Stages for a Content Manager

- Key review
  - Courtesy step; without a step, a user cannot act
- Convenient to nudge

Steps ⓘ									
Name	Description	Required	Generate Task Items	Users required to act	Allowable Actions	Timeout	Stage Transition Actions	Conditions	Assignments
Review Definition	Review the functional definition to be sure it follows our standard practices. Approve when ready and submit the definition for technical review.	no	yes	any	Edit Collaborate	0	Approve  Reject  Back to drafting		<a href="#">Data Stewards by Functional Area</a>
Monitor Data Stewards	A convenience step that allows the Data Cookbook content manager to edit and approve all definitions. These actions are taken when data stewards are unavailable.	no	no	any	Edit Collaborate	0	Approve  Reject  Back to drafting		<a href="#">Content Manager</a>

## 8. Designate a Content Manger

- Neutral party who maintains editorial and usage standards
  - Editorial: wiki links; vacuous text; grammar; spelling; title case
  - Usage standards: Spec type is used consistently; Tags are used correctly
- .25 or .5 FTE

# Summary

- Practice some or all of these items
- Content Manager or Data Steward as actor
- Document what is done
- Use documentation as marketing material

# 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



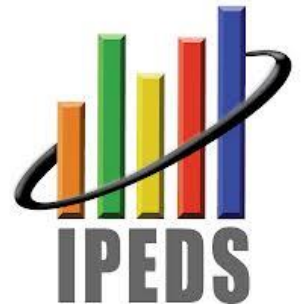
**Common Data Set Initiative**

*A collaborative effort between publishers  
and the educational community*

**NSLDS**



Achieving  
the Dream™



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 2020

- Purpose: Short, fun, and focused on features
- Upcoming Dates and Topics: COMING SOON
  - October
  - November
  - December
- 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

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

Thurs., June 25 - **Why Having a Data Quality Issue Reporting Process is So Valuable**

Thurs., July 2 - **Tips for Writing Great Business Glossary**

Wed., July 8 - **Managing Changes to Reference Data Lists**

Tues., July 14 - **Responsibility of a Data Governance Leadership and Oversight Committee**

Thurs., July 16 - **Pragmatic Tips for Data Governance Oversight**

Wed., July 22 - **Best Practices for Leveraging Data Governance During Major ERP Implementations**

*\* All 30 minutes in duration and start at 2pm Eastern (11am Pacific)*



# 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](#).

[View  
Recorded Webinar  
List](#)

### Upcoming Webinars

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

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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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Videos](#)

### 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>

# Send your topic suggestions!

Help Us Provide You With Information You Want

- YouTube Channel Videos
- Blog Posts
- Webinars
- Workshop Wednesdays
- Just-in-Time Trainings

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

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[marketing@idatainc.com](mailto:marketing@idatainc.com)

# 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

