Reference Data Lists

Use Reference Data Lists to manage code lists and valid values. This session reviews the key features including Master List, Roll Ups, deprecating list items, and connecting a list to a definition. This is a feature in the Data Cookbook Enterprise Edition.

Workshop Wednesday #18

October 21, 2020

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 tomorrow

Use the Chat Box for questions

Welcome

Say Hello in Chat – institution, number of people, questions you want answered today

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

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idata

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ACTING AS ADMINISTRATOR

What information are you looking for?

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Training Resources

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Help

Training Resources

Resource	Description
Just-in-Time-Training Videos	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.
Workshop Wednesdays	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.
Recorded Public Videos	Previously recorded webinars on various presented by IData that cover the Data Cookbook and Data Governance related subjects.
Upcoming Public Videos	View the schedule of upcoming Data Cookbook and Data Governance webinars.

Support

Support

Resource	Description
Email Support	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
Extra Data Cookbook Resources	Find additional client resources from Data Cookbook knowledge base for using and implementing the Data Cookbook.
Questions and Support forum	Browse questions asked by other users or post your own questions about how to work with the Data Cookbook.
System Announcements Forum	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
User's Guide	11/19/2019	Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.
Administrator's Guide	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 worfklows.
External Authentication	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.
Test Instances	08/21/2019	Reference documentation for administrators and users who are working in the Test Instance of the Data Cookbook.
Metrics Dashboard	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.
Private Community User's Guide	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

More Support:

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

- Ask clients – Post to *Questions and Support* in the Forum

Blog post

Here are Some Resources Regarding Reference Data Lists

October 20, 2020   By Jim Walery

In committee, data, governance, idata, Data Cookbook, management, resources, reference

Reference data is the forgotten content in data governance. It needs to be documented and managed just like business glossary definitions and report specifications. Over time we have gathered quite a few resources in various formats regarding reference data and valid value lists so we thought we would share them to you in a resources blog post. We hope that you take advantage of some or all these resources if managing reference data is part of your job function.

https://blog.idatainc.com/reference-data-resources

Contains Links:

5 videos

2 webinars

6 more blog posts

Workshop Wednesday Agenda

- What is a Reference Data List?
- Fields and Features
- Advanced features
- 3 ways to Create a List
- Q&A

What is a Reference Data List?

A reference data list provides a convenient way to discover and compare values across data systems. The list displays the values of a data attribute within one or more data systems, without requiring access to the data system(s).

This is a feature in the Data Cookbook Enterprise Edition

Fields and Features – aka Demo

- Name and Description – *Program Admit Code*

- Functional Area

- Data System and Schema Objects -*STVADMT_CODE for Banner; Add for Data Warehouse*

- Workflow

- Comments

- Relate to a Definition via Embedded Quality Attribute

Advanced Features

- Master List – Academic Division

- Roll Up - Student Activities Categories and Student Activities – note defect

- "Related" definitions – populated by Embedded Quality Attributes

- "Related" quality rule – populated by Valid Value rule type selection

Summary

- Use Reference Data lists:
  - To manage change to valid value lists
  - To communicate valid values without the hassle of providing access to data systems
  - To communicate valid value crosswalks
- Connect to Quality Rules and Embedded Quality Attributes
- 3 Ways to populate a list
  - IDataHub automates the process once the list is created
  - Copy/Paste
  - Type it manually

Data Cookbook Fall User Group Meeting
Register now!

November 18 at 2 PM EST

<link to register in chat>

https://attendee.gotowebinar.com/register/4332034442152073487

Be Part of the Community

community.datacookbook.com

- Open to everyone

- Content from regulatory agencies and other institutions.

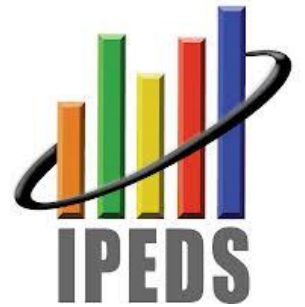- Data definitions, Specifications, Contact information, Documentation

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News Updates

News, Updates, & Social Media

Resource	Description
Data Cookbook News	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.
IData News	Browse the latest public news and announcements from the Data Cookbook website
Twitter	Follow us on Twitter!
IData YouTube Channel	Find content recorded by IData experts on Data Governance topics

Additional Resources

Resource	Description
Data Cookbook Forums	Browse all the Data Cookbook Community forums.
Data Insights Blog	See the latest blog postings from our staff on various subjects including Data Cookbook and Data Governance

Workshop Wednesday Recordings

https://go.idatainc.com/dcb-workshops

Data Governance Resources Page

Data Governance Resources

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IData experts have recorded an entire webinar series on pragmatic data governance including Overview.

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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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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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Contact us at <u>marketing@idatainc.com</u>

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  - ➢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 if interested