

# 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

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

Use the Chat Box for questions

# Welcome

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

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



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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

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## Public Forums

Forum	Topics	Posts	Last Post	Watched?
<b>70</b> <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 <b>In:</b> Next Data Cookbook Workshop Wednesday is... <b>By:</b> Jim Walery - IData Incorporated	<a href="#">Watch</a>
<b>115</b> <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. <a href="#">Follow us on Twitter for News an</a>	116	155	3 months ago <b>In:</b> November 2019 Release <b>By:</b> Aaron Walker - IData Incorporated	<a href="#">Watch</a>
<b>216</b> <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 <b>In:</b> Functional Areas List Very Difficult to ... <b>By:</b> Kristina Harvey - Simon Fraser University	<a href="#">Watch</a>
<b>11</b> <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 <b>In:</b> HTML customizations for pop-up <b>By:</b> Kristina Harvey - Simon Fraser University	<a href="#">Watch</a>
<b>5</b> <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 <b>In:</b> Using Workday ERP and Data Cookbook <b>By:</b> Cutler, Cynthia - Florida Gulf Coast	<a href="#">Watch</a>

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

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



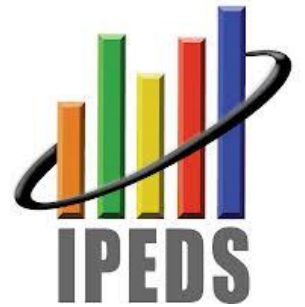
**Common Data Set Initiative**

*A collaborative effort between publishers  
and the educational community*

**NSLDS**



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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 Recordings



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Tips to Manage Data Cookbook Content (36:21)

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Data Governance Where You Least Expect It:  
Responding to Unexpected Times (59:29)

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Specifications 5 Ways (29:54)

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User Engagement Strategies (39:40)

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Data Request Process - 3 Ways (35:53)

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Specification Approval Workflow (42:41)

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[Slides](#)

Managing Reference Data 10/21/20

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User Permissions 101 (59:18)

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[Slides](#)

How to Import Definitions (37:24)

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[Slides](#)

Quality Rule Workflows (48:03)

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Perform Workflow Tasks in Bulk (29:43)

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All About Tags, Synonyms and Attachments (33:38)

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Migrate to New Workflow (43:24)

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

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

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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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IData experts have recorded data governance-related videos that are posted on YouTube.

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### Pragmatic Data Governance eBook

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

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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

