

Documenting New and Existing Data Integrations with Data Cookbook

A Data Governance Initiative at UNF



Basic Terminology

- **Data Domain** – a classification of data managed or controlled by a data steward. Data can be classified into one or more data domains for which one or more data stewards are responsible.
- **Data Definition** – representing word or phrase that refers to an object, person, business concept, measurement, metric, etc., in use at your organization.
- **Data Specification** – describes your reporting deliverables, such as reports, spreadsheets, dashboards, extracts, integrations, database views, or tables in a data store.

Data Domains and Data Stewards

- **Student:** University Registrar and Director of Records and Registration – Chad Learch
- **Financial Aid:** Assistant Vice President for Enrollment Management and Student Financial Aid – Anissa Agne
- **Human Resources:** Assistant Vice President, Chief Human Resources Officer – Carrie Guth
- **Finance:** Assistant Vice President, Controller – Valerie Stevenson
- **University Development:** Assistant Vice President of Advancement Operations and Annual Giving – Olga Igolnikov

What is a Data Integration?

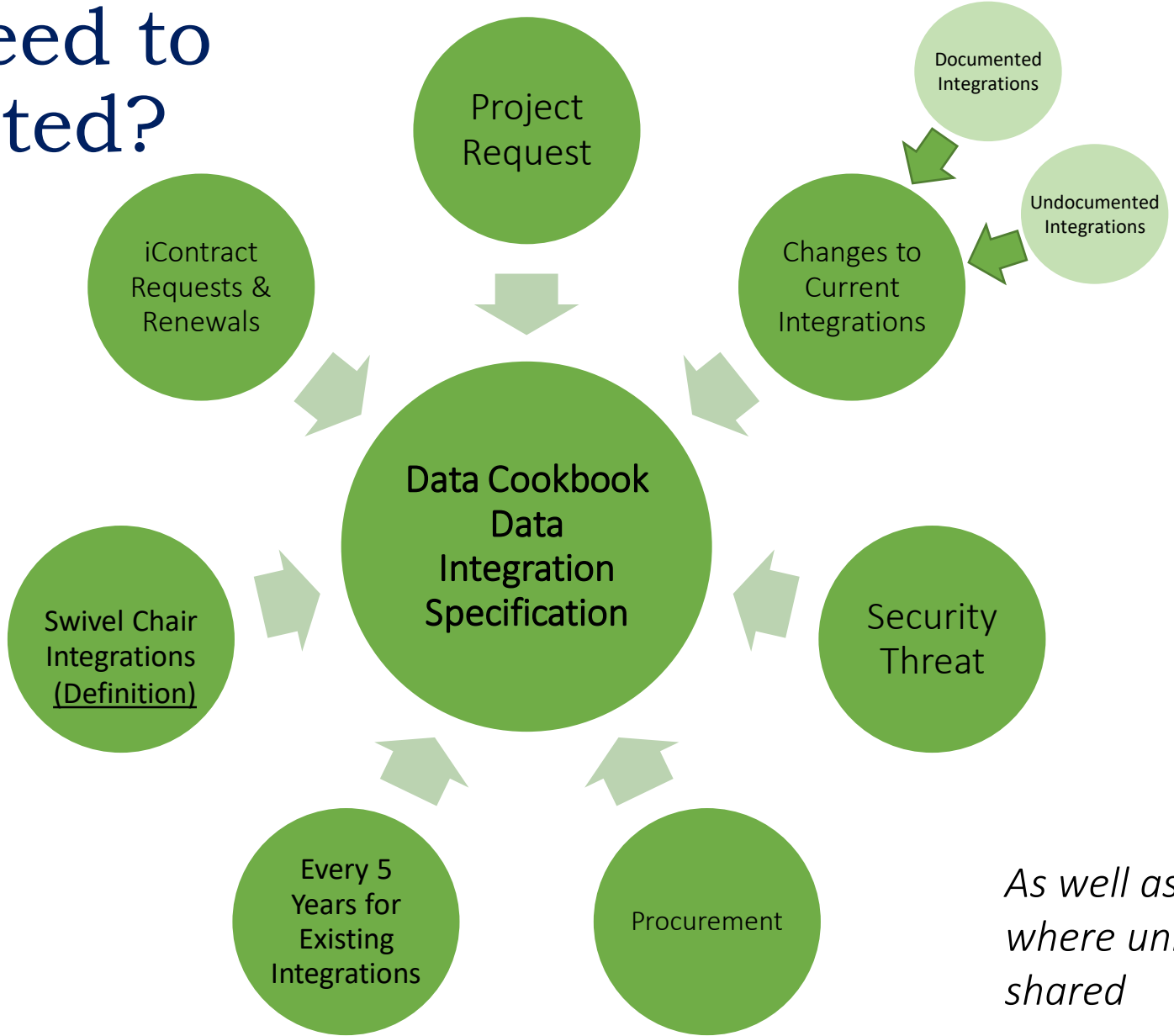
"Data integration is the combination of technical and business processes used to combine data from disparate sources into meaningful and valuable information." - IBM



Documenting Data Integrations

- Effective Summer 2019, the Data Management Council approved the use of Data Cookbook to document all new and existing integrations for products and services that require the sharing, generation, or storage of University data.
- Using Data Cookbook allows UNF to:
 - memorialize the existence of information and data;
 - track the approval of such existence;
 - record revisions to the nature and scope of such information and data.

When Does a Data Integration Need to be Documented?

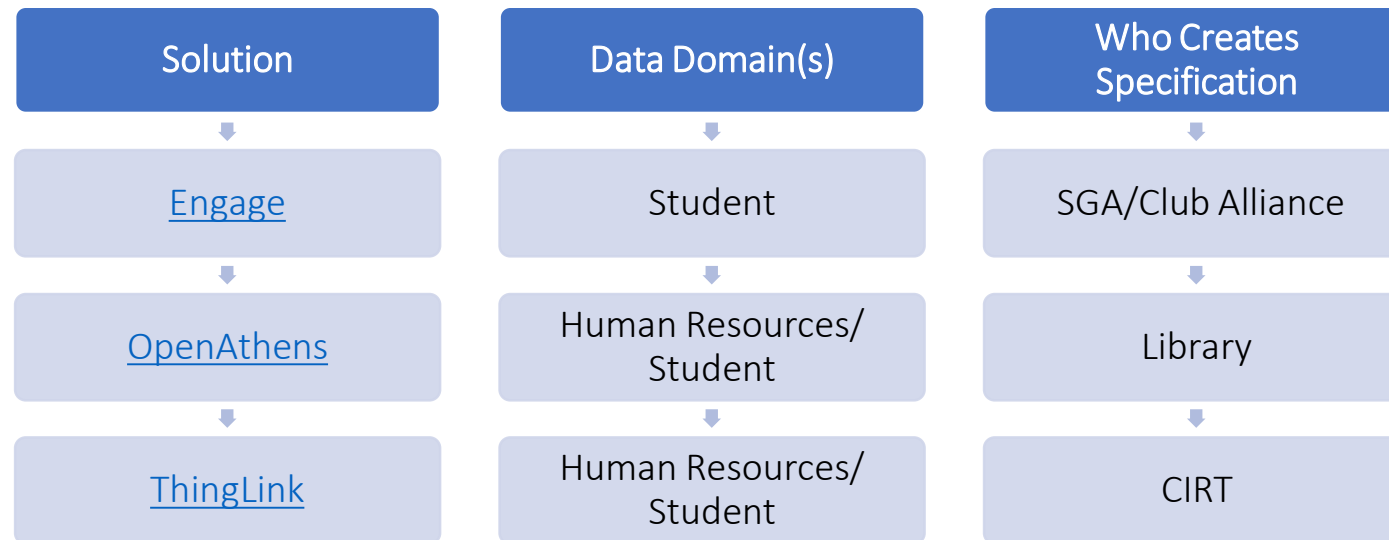


As well as any other instance where university data is being shared

Who Needs to Create a Specification for Data Integration?

The functional owner of the product or solution that requires the sharing, generation, or storage of University data.

Examples:



Please contact the Office of Institutional Research (904-620-2015 or oir@unf.edu), if you need to submit a data specification and do not currently have access.

data cookbook®

The Data Cookbook is UNF's official Data Dictionary. The Data Cookbook is a collaborative online data dictionary and data management solution that allows for information sharing and standardization of functional and technical definitions across the university.

Resources:

<https://unf.datacookbook.com/>

https://www.unf.edu/ir/inst-research/Data_Cookbook_Initiative.aspx

Creating a Specification: Step by Step

The next few slides will walk you through the process of creating a specification through the following steps:

1. Navigate to unf.datacookbook.com and choose 'Create Specification' from the Specification tab
2. Provide basic information (Specification Name, Specification Type, and Functional Area) on the data integration
3. Provide the purpose and description for the data integration
4. Save your specification and 6. 'Submit for Provisional Approval'
OR
5. Navigate to the Definitions tab and provide requested data fields if known and then 6. 'Submit for Provisional Approval'

1

Navigate to unf.datacookbook.com and choose 'Create Specification' from the Specifications tab

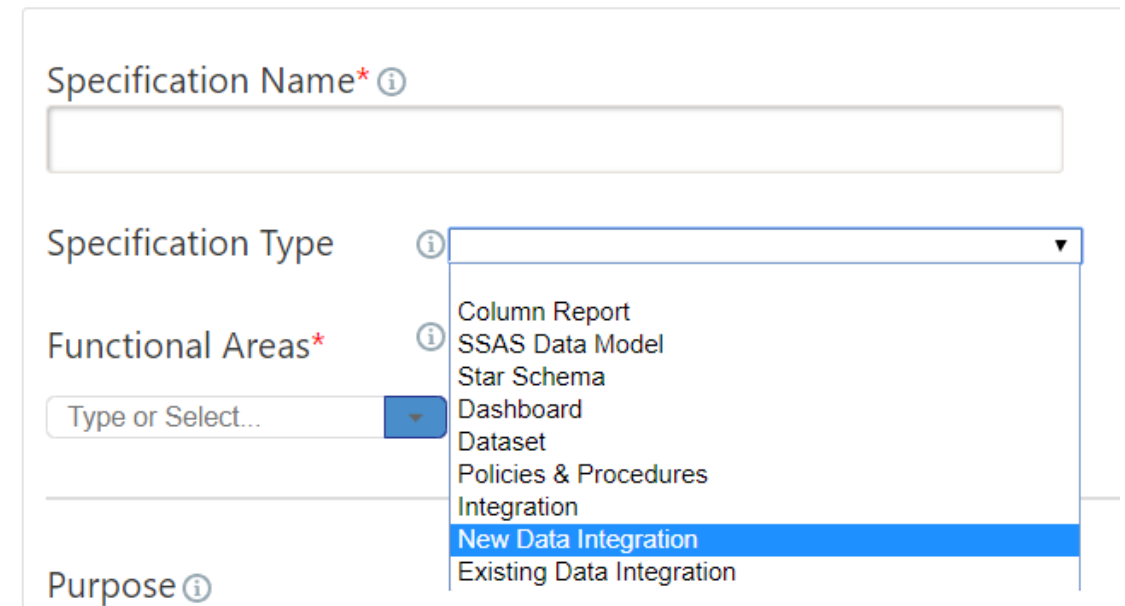
The screenshot shows the website <https://unf.datacookbook.com>. The browser's address bar and tabs are visible at the top. The website header includes the UNF University of North Florida logo, user information for Abby Willcox, and the data cookbook logo with a search bar. A navigation menu is present with tabs for Home, Definitions, Specifications, Organization, and Community. The Specifications tab is active, and a dropdown menu is open, listing options: View your organizations' specifications for reports and other reporting components. You can create new specifications or browse through existing ones to learn more about them., Browse Specifications, Create a Specification (highlighted with a green arrow), Specification Queue, and Import Specifications. Below the navigation, there is a search bar and a 'Tasks' section with a 'REVIEW DEFINITION STANDARDS' button and a link for 'Graduate Program GPA'.

2 Provide basic information on the data integration

Specification Name – for data integrations we use a standard nomenclature UNF External Data Integration - 'Product Name' (ie. [UNF External Data Integration – Cornerstone](#))

Specification Type – the specification type will determine the appropriate workflow. For integrations, please select [New Data Integration](#) or [Existing Data Integration](#).

Create a specification



The screenshot shows a form titled "Create a specification" with the following fields and options:

- Specification Name***: A text input field with an information icon.
- Specification Type**: A dropdown menu with an information icon. The dropdown is open, showing the following options: Column Report, SSAS Data Model, Star Schema, Dashboard, Dataset, Policies & Procedures, Integration, **New Data Integration** (highlighted in blue), and Existing Data Integration.
- Functional Areas***: A text input field with a "Type or Select..." placeholder and a dropdown arrow.
- Purpose**: A text input field with an information icon.

2 Provide basic information on the data integration

Functional Area – based on the type of data being requested, choose one or more data domains from the five core data domains (ie. for information on students' majors, select **Student**):

1. Student
2. Financial Aid
3. Finance
4. Human Resources
5. University Development and Alumni Engagement

The screenshot shows a web form titled "Functional Areas*" with a help icon and a link to "Data Domains". Below the title is a search input field with the placeholder text "Type or Select...". A dropdown menu is open, displaying a list of options. The first option, "University of North Florida", is highlighted in light blue. The other options are "Finance", "Financial Aid", "Human Resources", "Student", "University Development & Al...", and "University of North Florida -". Each option has a right-pointing chevron icon.

3

Provide the purpose and description for the data integration

Specification Purpose – provide the reason for the product and the university goals for product requiring integration.

Specification Description – provide information about the product and how the integrated data will be used to achieve the purpose.

Purpose ⓘ

☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷ | Size ▾ | A **B** *I* U ~~S~~ | 🔗 📄

Why?

To use a browser context menu should hold down 'Ctrl'.

Description ⓘ

☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷ | Size ▾ | A **B** *I* U ~~S~~ | 🔗 📄

What & How?

To use a browser context menu should hold down 'Ctrl'.

4

Save your specification

Workflow: [Specification Approval Workflow](#)

Save

Approve

or [Cancel](#)

Once your specification has been saved, you will be provided with more options to add additional information. If you only know the data domains and not the specific fields, please [Submit for Provisional Approval](#) (Step 6).

Description ⓘ

Source | Bullets | Lists | Indent | Outdent | Quote | Size | A | B | I | U | S

Description

body p

To use a browser context menu should hold down 'Ctrl'.

Submit to Specification Queue

Due Date ⓘ Priority ⓘ

(yyyy-mm-dd)

Comment ⓘ

Workflow: [Specification Approval Workflow](#)

Save Approve or [Cancel](#)



Example: Saved Specification in Draft

SPECIFICATION: NEW DATA INTEGRATION


UNF External Data Integration - Engage - Demo

 Comment (0 comments)

 On my watch list



Draft specification

Version 1  1

[Show workflow](#)

Submit for Provisional Approval

Cancel

Overview

Definitions

Selections

Sort Criteria

Technical

Display Details

Attachments


Sharing

 Edit

Purpose



Club Alliance currently doesn't have a set system to collect all required documents from the Registered Student Organizations. They have been using a survey tool and Qualtrics, but they still have to upload, organize and rearrange all information. With that being said, Club Alliance has run into many problems related to compliance and organization. It's extremely important that the data being collected is accurate. During the club registration process the organization has to comply with strict rules and guidelines set by Student Government and the University. All Advisors have to become trained to be a Campus Security Authority, the RSO has to submit a constitution, sign a document indicating its officers and that they have read the SG RSO Handbook and other important documents. As Student Government, we need to insure that the organizations are being compliant with the University's rules and regulations.

Student Government doesn't have one set system to facilitate assessment and collect

 FUNCTIONAL AREAS 

Student



 RELATED SPECIFICATIONS 



No Related Specifications



 TAGS 

No Tags



 COLLECTIONS 

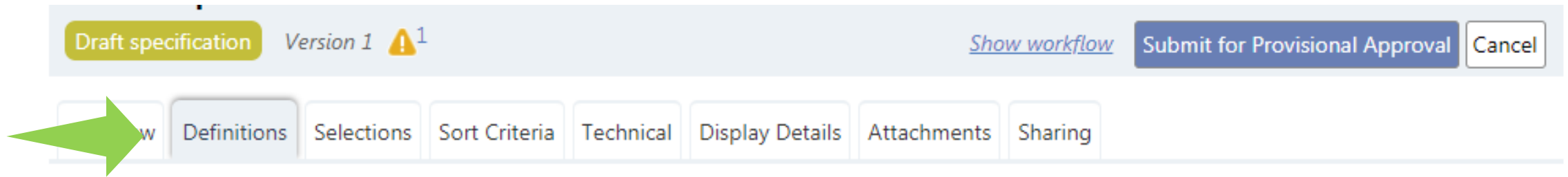
No collections

Delete specification

Copy this version

5

Navigate to the Definitions tab and provide requested data fields if known



Data Definitions ⓘ

Name ⓘ

Display Info ⓘ

Field Info ⓘ

Aggregate Info ⓘ

This specification has no definitions associated with it.

Select an existing definition or [create a new definition](#)

Select a Definition ▼

ADD TO SPECIFICATION

Data System ⓘ

Please select ▼

Display ⓘ

Details:

Location ⓘ

Reference ⓘ

Aggregate ⓘ

Details: ⓘ

Example: Adding Definitions to a Specification

Click on [Select a Definition](#) and begin typing to find existing definitions.

Overview Definitions Selections Sort Criteria Technical Display Details Attachments Sharing

Data Definitions ⓘ

Name ⓘ	Display Info ⓘ	Field Info ⓘ	Aggregate Info ⓘ
This specification has no definitions associated with it.			

Student i [create a new definition](#)

Student ID

Select a Definition ▲

ADD TO SPECIFICATION

Display ⓘ
Details: _____

Location ⓘ
Reference ⓘ

Aggregate ⓘ
Details: ⓘ _____

For definitions that do not exist in the Data Cookbook, please note the missing definition in the Comments section on the bottom of the [Overview](#) tab and send an email to abby.willcox@unf.edu

History and Comments ⓘ

1 : Draft specification (0 Comments) [show/hide version details](#)

Add a Comment:

Missing definition:
Age

Add Comment

No comments and system events on this version.
Created 8 minutes ago
Modified 8 minutes ago

6

Submit Specification for Provisional Approval



[Abby Willcox \(Log out\)](#) [Help](#) [Request Technical Support](#)
[Recent Updates](#) [Enable Admin](#)



Home

Definitions

Specifications

Organization

Community

SPECIFICATION: NEW DATA INTEGRATION

Test Specification

Comment (0 comments)

On my watch list



Draft specification

Version 1 1

[Show workflow](#)

Submit for Provisional Approval

Cancel

Overview

Definitions

Selections

Sort Criteria

Technical

Display Details

Attachments

Sharing



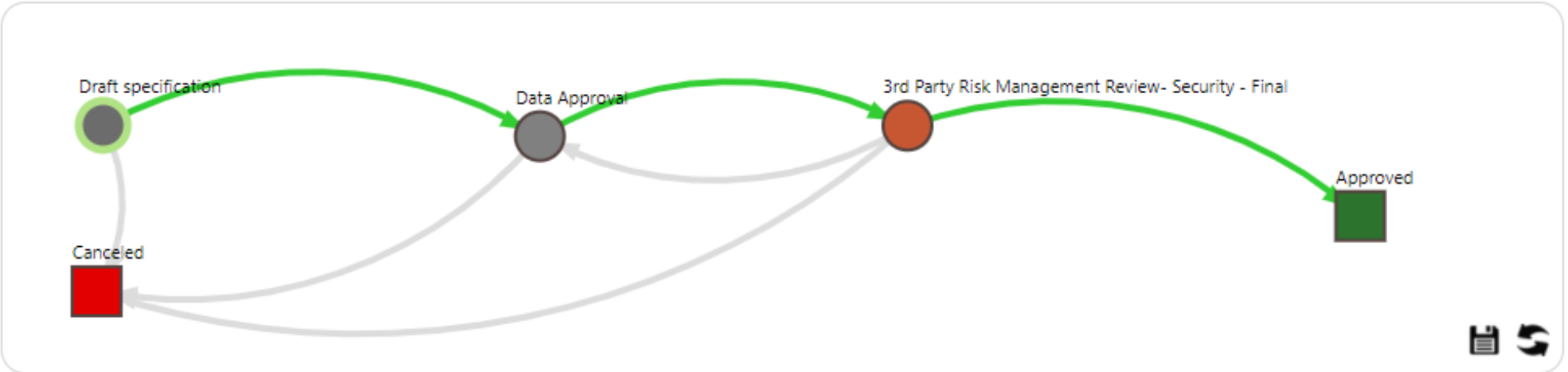
At this point, the initial requester has completed the draft specification. A New Data Integration specification then moves to the Data Steward(s) and the Privacy Officer for Data Approval Provisional and an Existing Data Integration then moves to Data Approval.

Data Integration Workflows

New Integration Workflow



Existing Integration Workflow



Build Specification

For specifications that are in the [New Data Integration](#) workflow, the specification will return to the specification requester in the Build Specification stage after Data Approval Provisional and 3rd Party Risk Management Review Provisional.

During the Build Specification stage, the specification requester will update the Purpose, Description, and Data Fields Integrated (Definitions tab) based on the most up-to-date information. Once the specification requester has updated the information and confirmed the specification is accurate and current, the specification will be submitted for Data Approval Final where the Data Steward(s) and Privacy Officer will review and take action on the specification.

Specification that are in the [Existing Data Integration](#) workflow do not have a Build Specification stage. The edits to an existing data integration specification are completed in the Draft stage.

Post-Provisional Approval Actions

The goal of the post-provisional approval stages is to avoid unnecessary delays of the scheduled “go live” date.

The specification requester is responsible during the Build Specification phase for continuing to revise the specification as more or different information becomes available. If there are significant changes the specification requester should communicate with the data stewards about the changes. If an additional data domain is added the specification builder should reach out to the appropriate data steward, their approval will be required during the Data Approval – Final stage.

When there are no further changes to the data specification and definitions, the specification can be submitted for Final Approval.

Once a specification is submitted for final approvals, it is possible for the specification to be sent back to the Build Specification phase. The best way to avoid this and the subsequent delays to communicate unexpected domain or scope changes throughout the specification build phase.

Final approval must be granted before a new solution “goes live.”

Third Party Risk Management

ITS Security will review for both Provisional and Final Approval for new integrations and once every 5 years for existing integrations.

UNF leverages the BitSight platform to calculate risk combining:

- The third party's BitSight Security Rating
- The classification of the data being used by the third party based on the UNF Data Classification Policy

The following documents may be required from the third party:

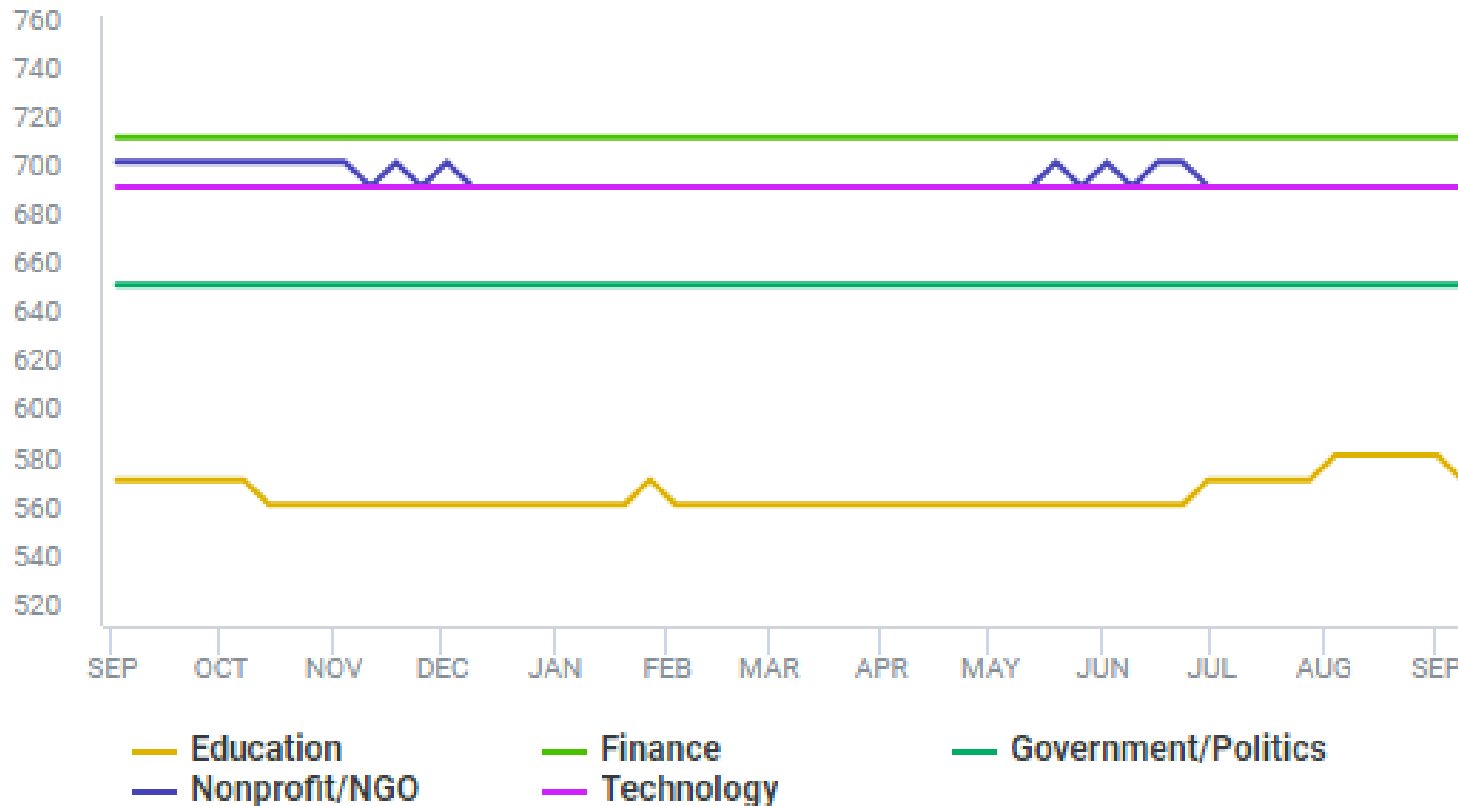
- SOC2 or SOC3 report on the hosting facility
- Completed HECVAT Full or HECVAT Lite
- Copy of the most recent Privacy Policy

BitSight Industry Ratings

Industry Ratings

Last 12 months

Industry ratings for the 5 most common industries in your portfolio



BitSight Risk Matrix

Portfolio Risk Matrix*
10/35 Companies Tiered

Manage Tiers



High Risk:
Requires Full
Documentation/ Audit

Low Risk:
Requires Minimal or No
Documentation

* You are viewing a customized version of the risk matrix

Vendor Action Plan

Monitor
 Review
 Escalate

Contact

For Assistance with this process,
please contact the Office of Institutional Research:

- Email – abby.willcox@unf.edu or oir@unf.edu

