

# Documenting New and Existing Data Integrations with Data Cookbook

A Data Governance Initiative at UNF



# Data

Information and Data are important and ever-expanding resources of the University.

Knowing where, when and with whom we share and store this resource is vital in meeting our regulatory, contractual and ethical obligations.

And Data Governance plays a central role.

# Data Governance

What is Data Governance?

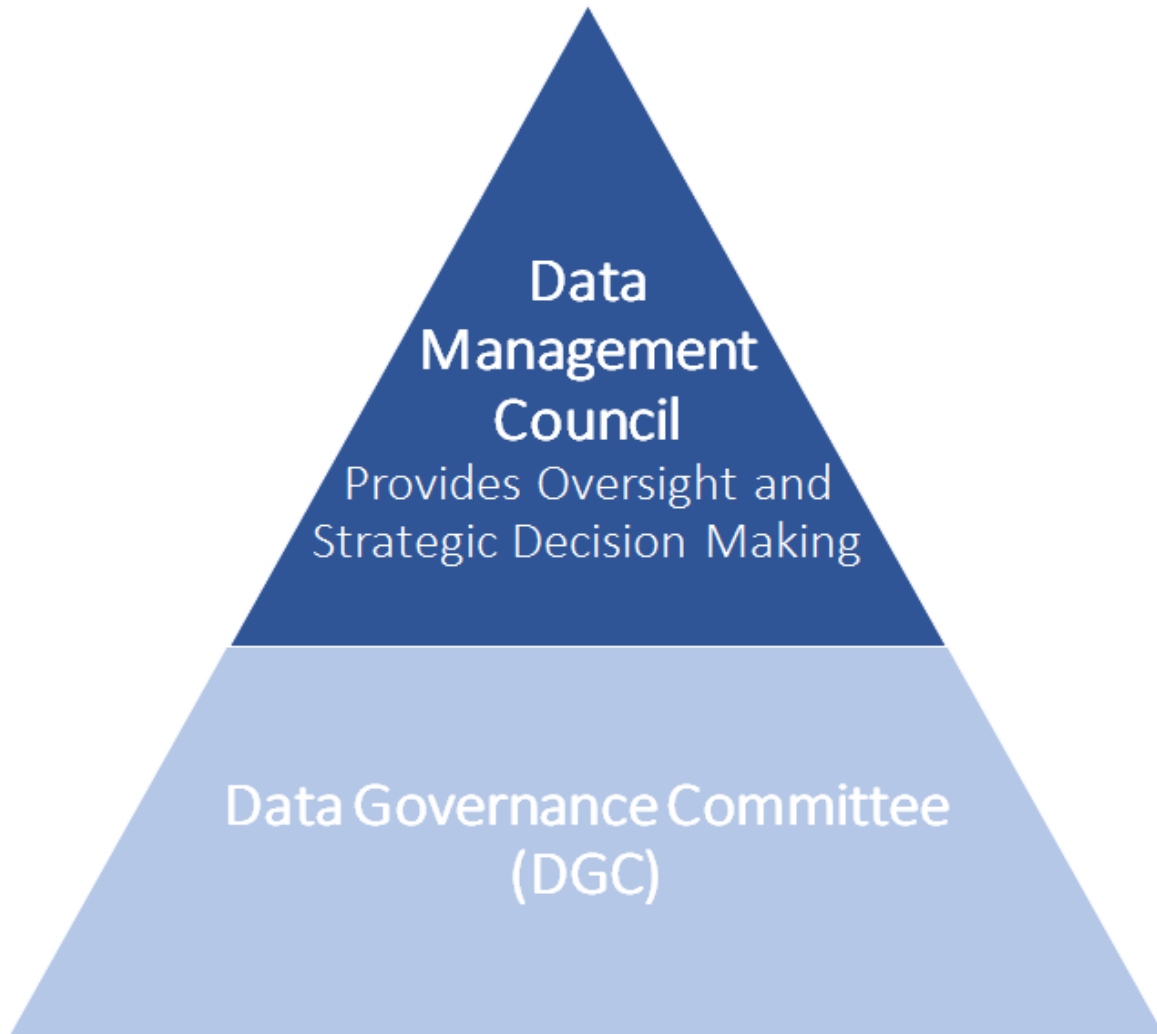
Data governance is the people, processes, and information technology required to consistently and properly handle information and data across the entire University enterprise.

# Data Governance

Data Governance adds value to the University by ensuring that institutional information and data are:

- reliable and accurate;
- interpreted uniformly across the University;
- reported appropriately and consistently to external agencies and constituents;
- protected from unauthorized access and use;
- optimized to enable its strategic use; and
- used in a legal and ethical manner.

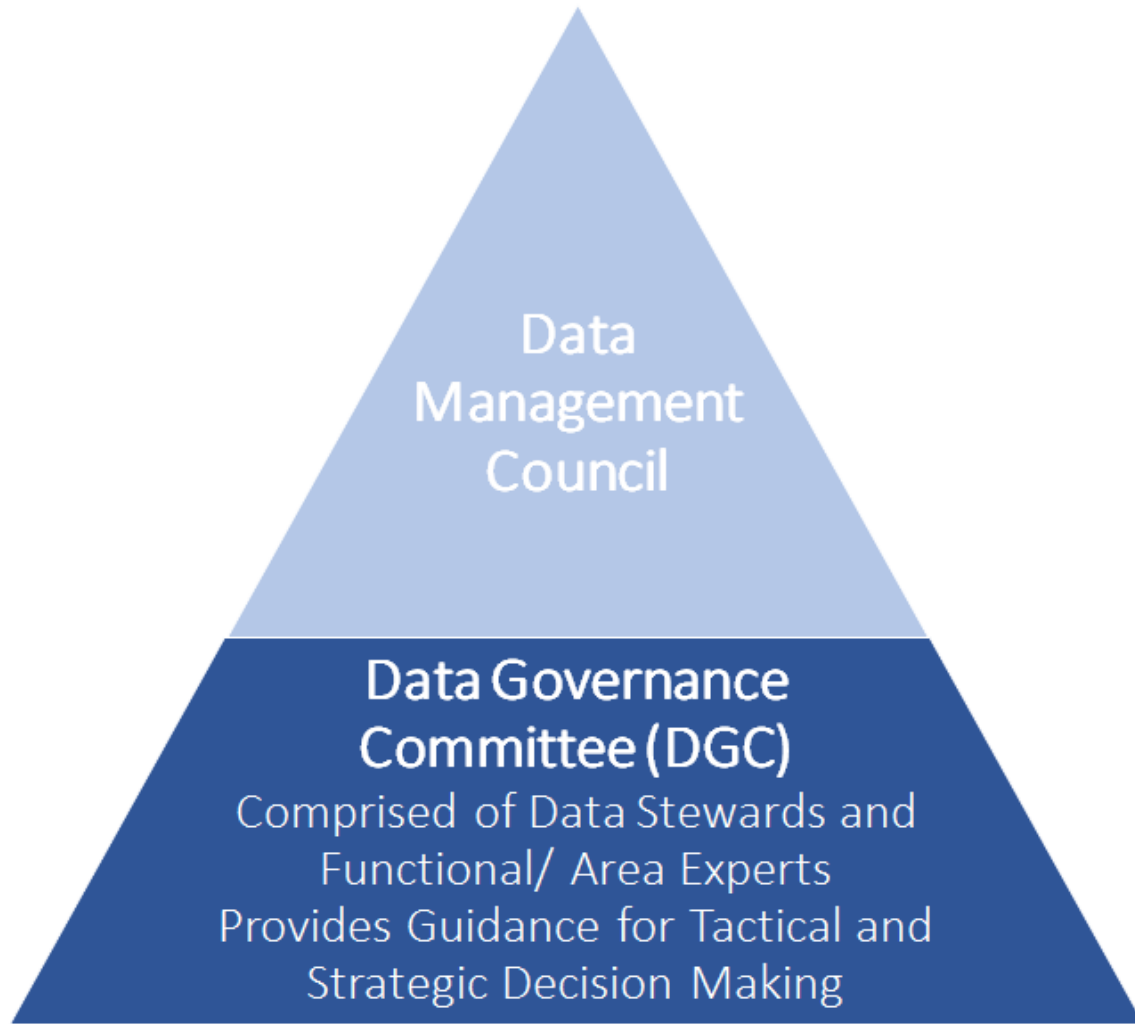
# Data Governance at UNF



## *Data Management Council Members:*

- Vice President for Data Analytics – Jay Coleman
- Associate Vice President and Chief Information Officer – Scott Bennett
- Privacy Officer – Rick Buck
- Associate Vice President for Research and Dean of the Graduate School – John Kantner
- Associate Vice President of Enrollment Services – Terry Curran

# Data Governance at UNF



## *Data Domains and Data Stewards:*

- **Student:** University Registrar and Director of Records and Registration – Chad Learch
- Ø **Financial Aid:** Senior Director, Enrollment Management and Student Financial Aid – Anissa Agne
- **Human Resources:** – Director of Human Resources – Carrie Guth
- **Finance:** University Controller – Valerie Stevenson
- **University Development:** Director of Development Operations – Olga Igolnikov

For a full list of Data Governance Committee membership, please see [www.unf.edu/DGOrg](http://www.unf.edu/DGOrg)

# 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.

# 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.

# Documenting Data Integrations

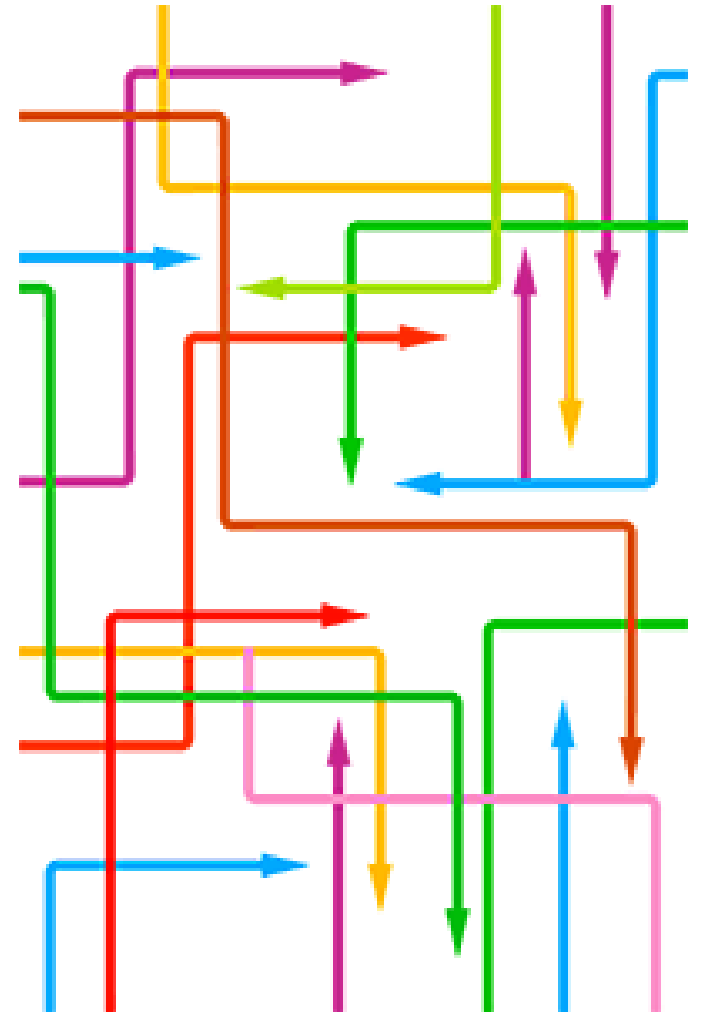
Aligns with the Following Data Governance Goals:

## Inventory

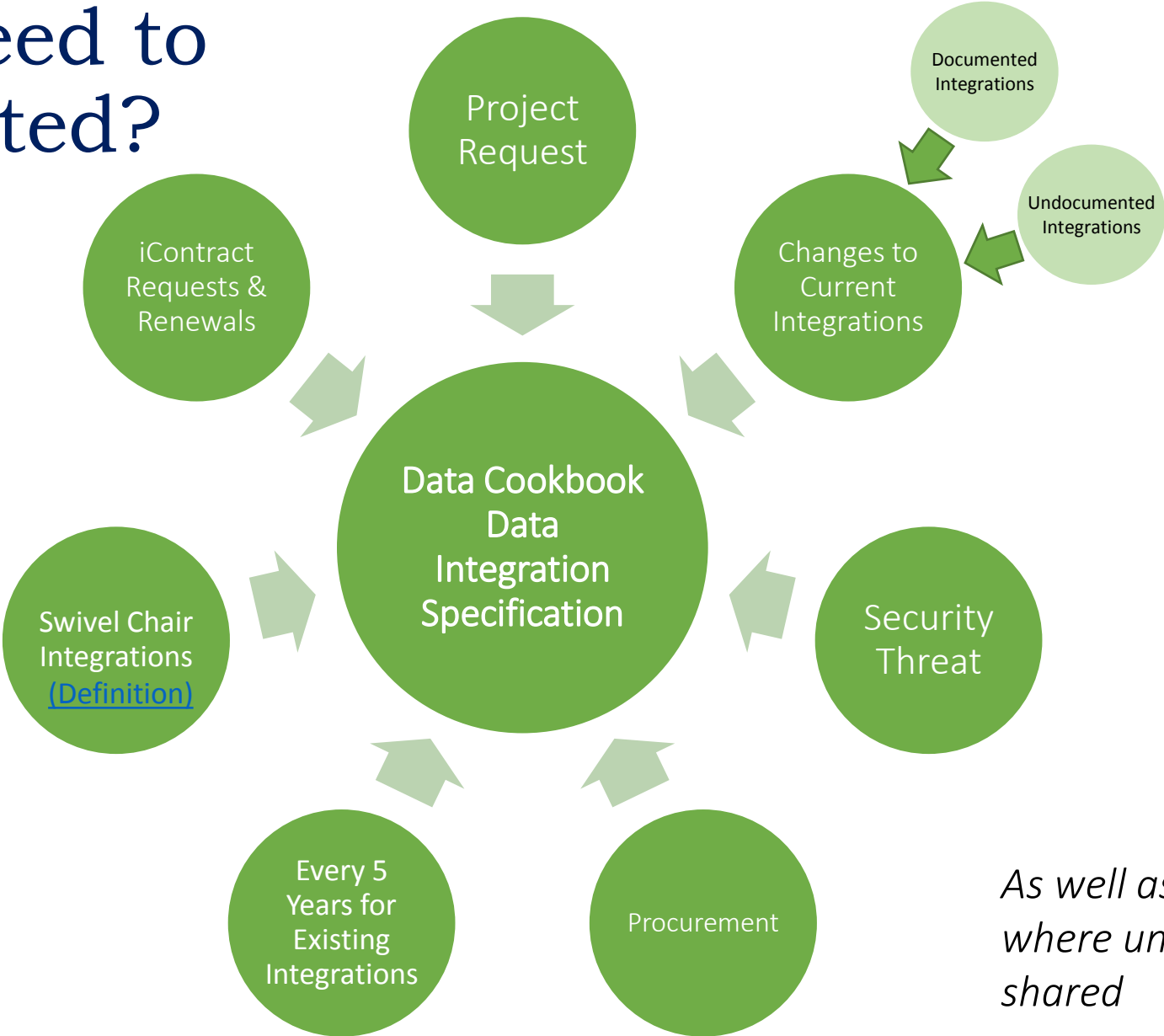
Documents the location of the University's data.

## Monitor

Ensure the University's data are capable of being used for the data's intended purpose and properly protected from misuse.



# When Does a Data Integration Need to be Documented?

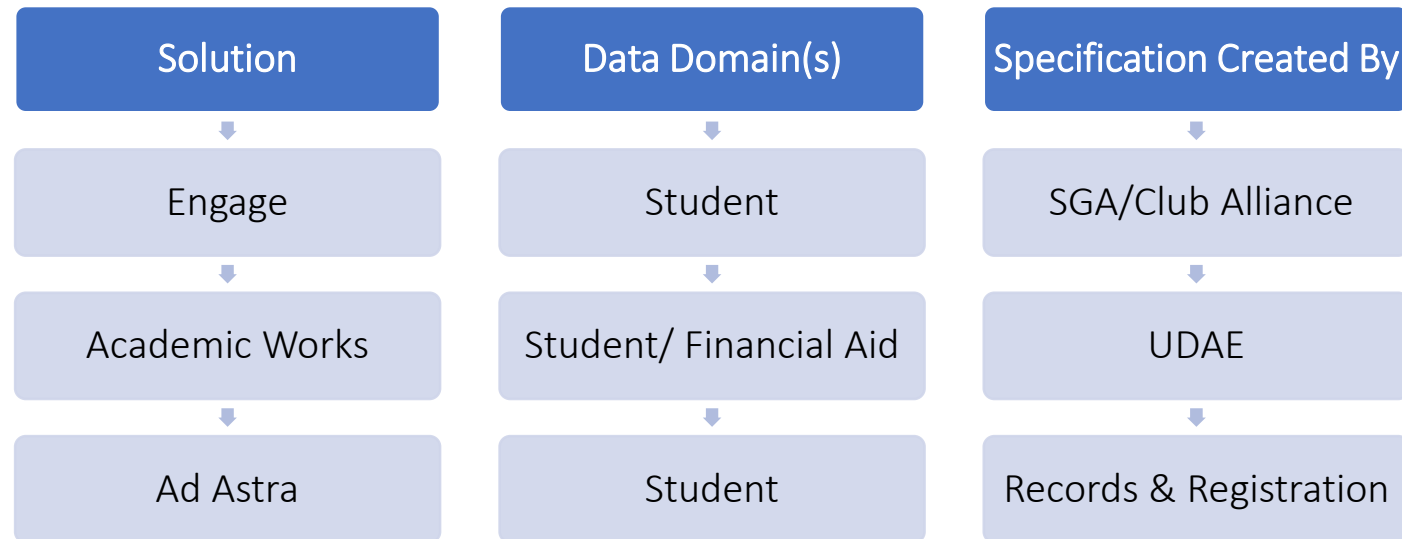


*As well as any other instance where university data is being shared*

# 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](mailto: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](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](http://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](https://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 menu, there is a search bar and a 'Tasks' section with a 'Definitions' dropdown. A 'REVIEW DEFINITION STANDARDS' button is also visible, along with a link for 'Graduate Program GPA'.

## 2 Provide basic information on the data integration

**Specification Name** – choose a unique and descriptive name for the specification. Ex: UNF External Data Integration - Engage

**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 web form titled "Create a specification". It contains several fields:

- Specification Name\***: A text input field with an information icon (i).
- Specification Type**: A dropdown menu with an information icon (i). The dropdown is open, showing a list of 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 (i).



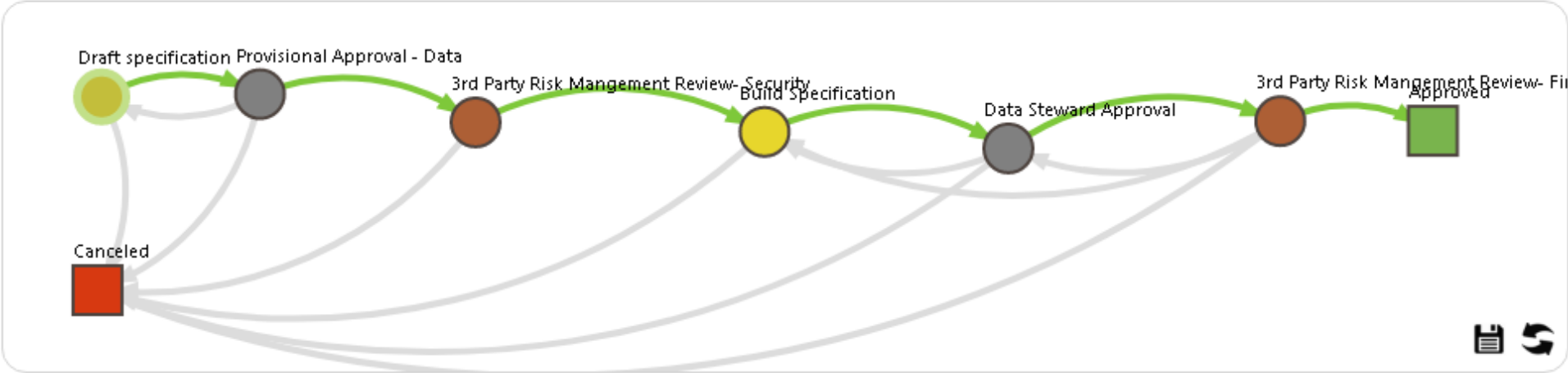
# Clarification on Specification Type

- Use [Existing Data Integration](#) *only* if an approved data integration specification already exists in Data Cookbook.
- In all other cases, use [New Data Integration](#), even if it is for a solution already in use at UNF.

# Specification Type Determines the Appropriate Workflow

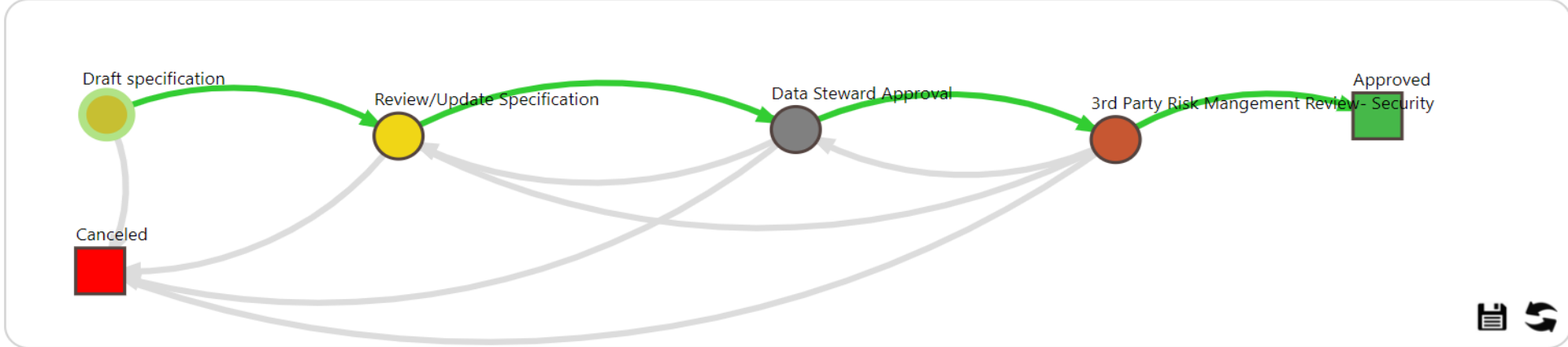
## New Integration Workflow

Diagram: ⓘ



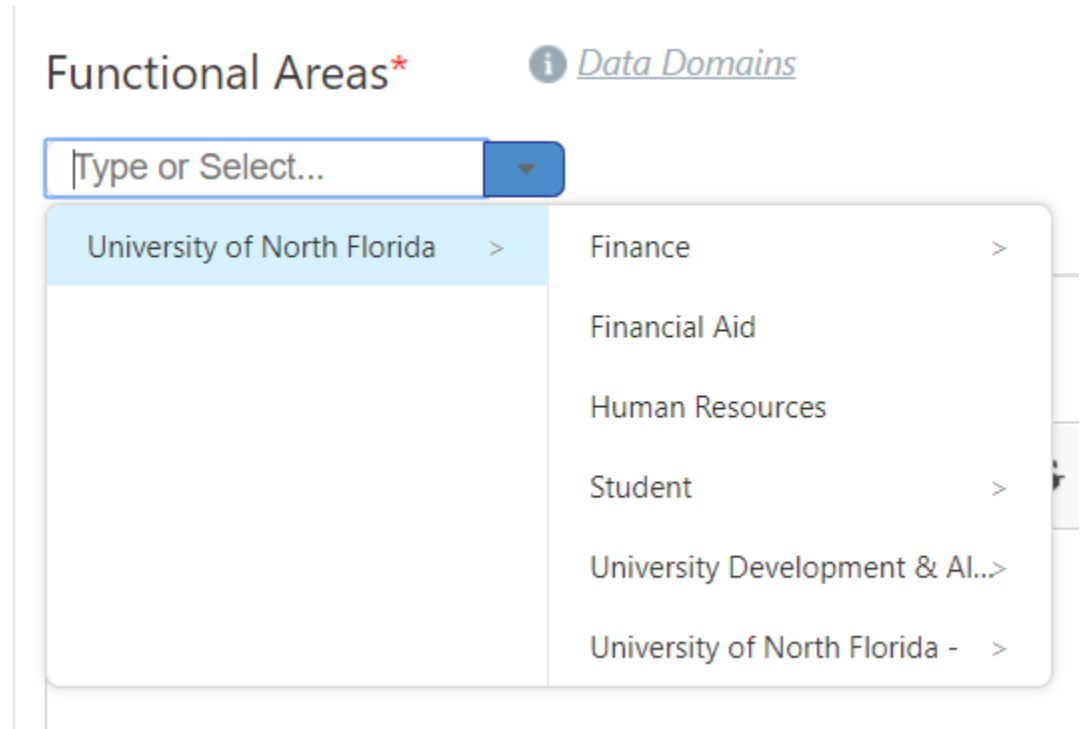
## Existing Integration Workflow

Diagram: ⓘ



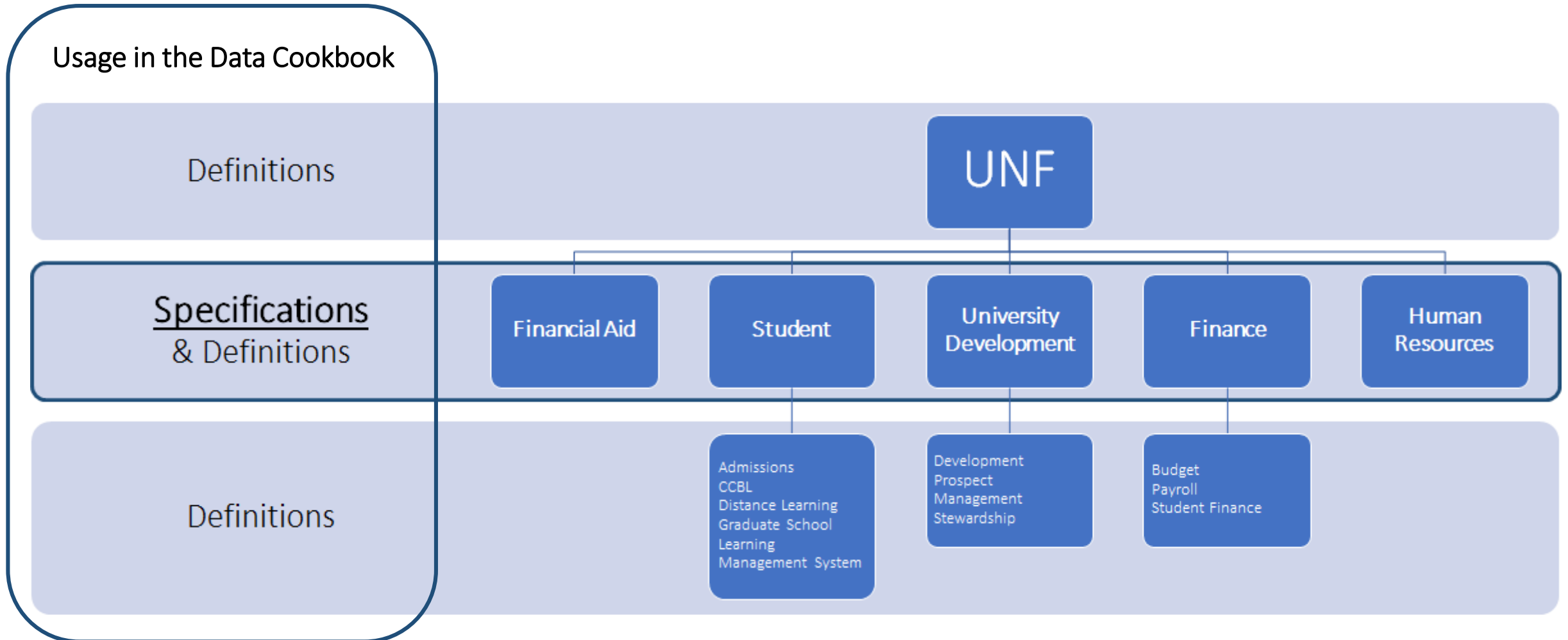
## 2 Provide basic information on the data integration

**Functional Area** – based on the type of data being requested, choose one or more data domains from the five core data domains: Student, Financial Aid, Finance, Human Resources, and Advancement and Alumni. Ex: for information on students' majors, select **Student**.



The screenshot shows a web form titled "Functional Areas\*" with a link for "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 functional areas: "University of North Florida", "Finance", "Financial Aid", "Human Resources", "Student", "University Development & Al...", and "University of North Florida -". Each item in the list has a right-pointing chevron (>) next to it. The "University of North Florida" item at the top of the list is highlighted with a light blue background.

# For the Function Area, Choose One or More Data Domains Based on the Type of Data that Will be Used in the Integration



# 3

## Provide the purpose and description for the data integration

**Specification Purpose** – provide the reason for the application and the goals for product requiring integration. This can be obtained from the project proposal

**Specification Description** – provide information about the product and how the data will be used to achieve the purpose. This can be obtained from the project proposal.

Purpose ⓘ

Why?

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

Description ⓘ

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).

### Create a specification

Specification Name\* ( )  
Data Integration Test

Specification type ( ) [New Data Integration](#)

Data integrations share information from one university system or service with another university system or service for the purpose of conducting university business. The New Data Integration specification type should be used for data integrations without an existing specification. Data integrations with existing specifications should use the existing Data Integration specification type.

Functional Areas\* ( )

Type or Select... [DEMAND Student](#)

Purpose ( )  
Purpose

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

Description ( )  
Description

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

Submit to Specification Queue

Due Date ( ) (yyyy-mm-dd) Priority ( )

Comment ( )

Workflow: [New Integration Workflow](#)


Save [Submit for Provisional Approval](#) 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 

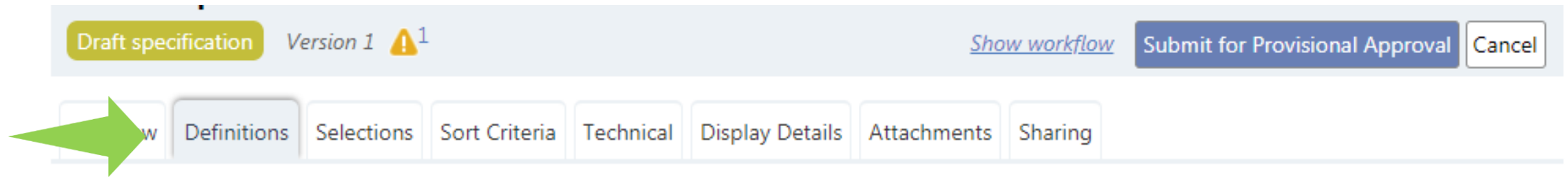
No collections

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.

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

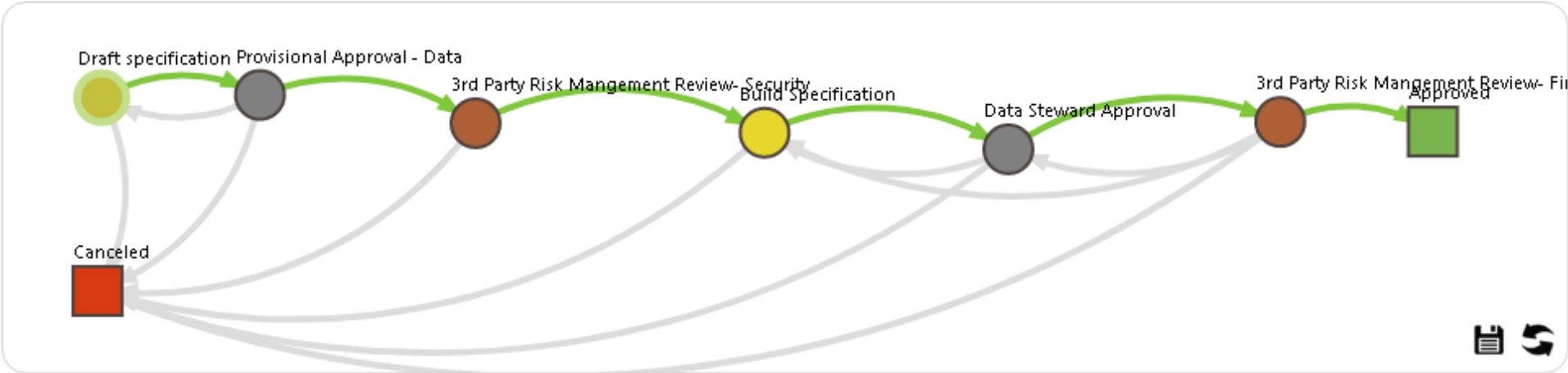


At this point, the initial requester has completed the draft specification. The specification then moves to the Data Steward(s) and the Privacy Officer for Provisional Approval.

# Workflows

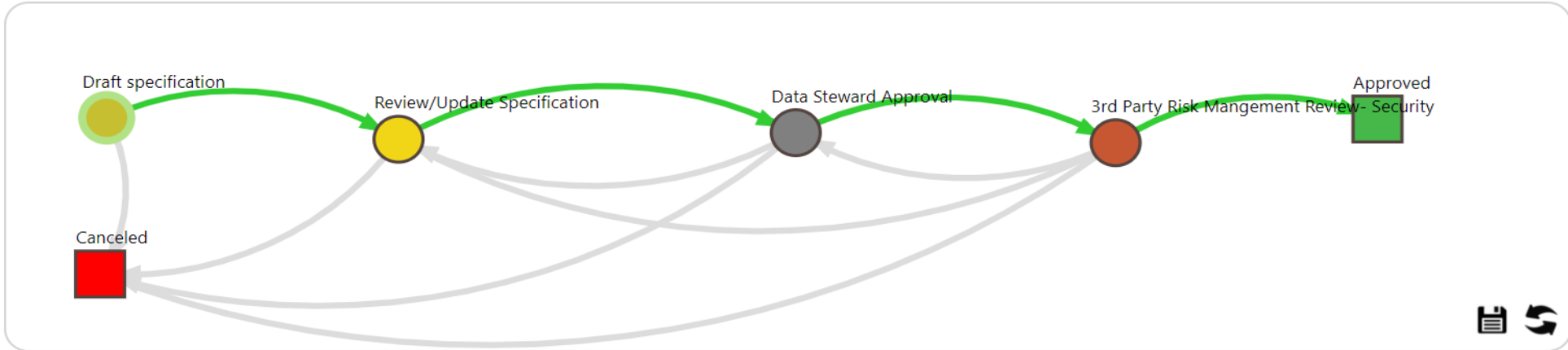
## New Integration Workflow

Diagram: ⓘ



## Existing Integration Workflow

Diagram: ⓘ



# Post-Provisional Approval Actions

Provisional Approval means that the requester can proceed to the next step in the process. The next step in the process may be:

- Defining more detail about the specification, including additional data definitions
- Purchasing a product through iContracts that will use the information in the specification
- Designing, building and implementing a solution that uses the information in the data specification

# Post-Provisional Approval Actions

If there are significant changes regarding the data specification or type of data requested during the Specification Building stage, the specification builder should return to draft and submit the changes for provisional approval by the data steward and privacy officer. An example would be the introduction of a new data domain.

If there are significant changes regarding the data specification or type of data requested at the time the specification has been submitted for final approval, the functional owner/specification builder will need to reach out to Institutional Research to move the specification back to drafting or build specification stage based on the type of changes.

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

**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:

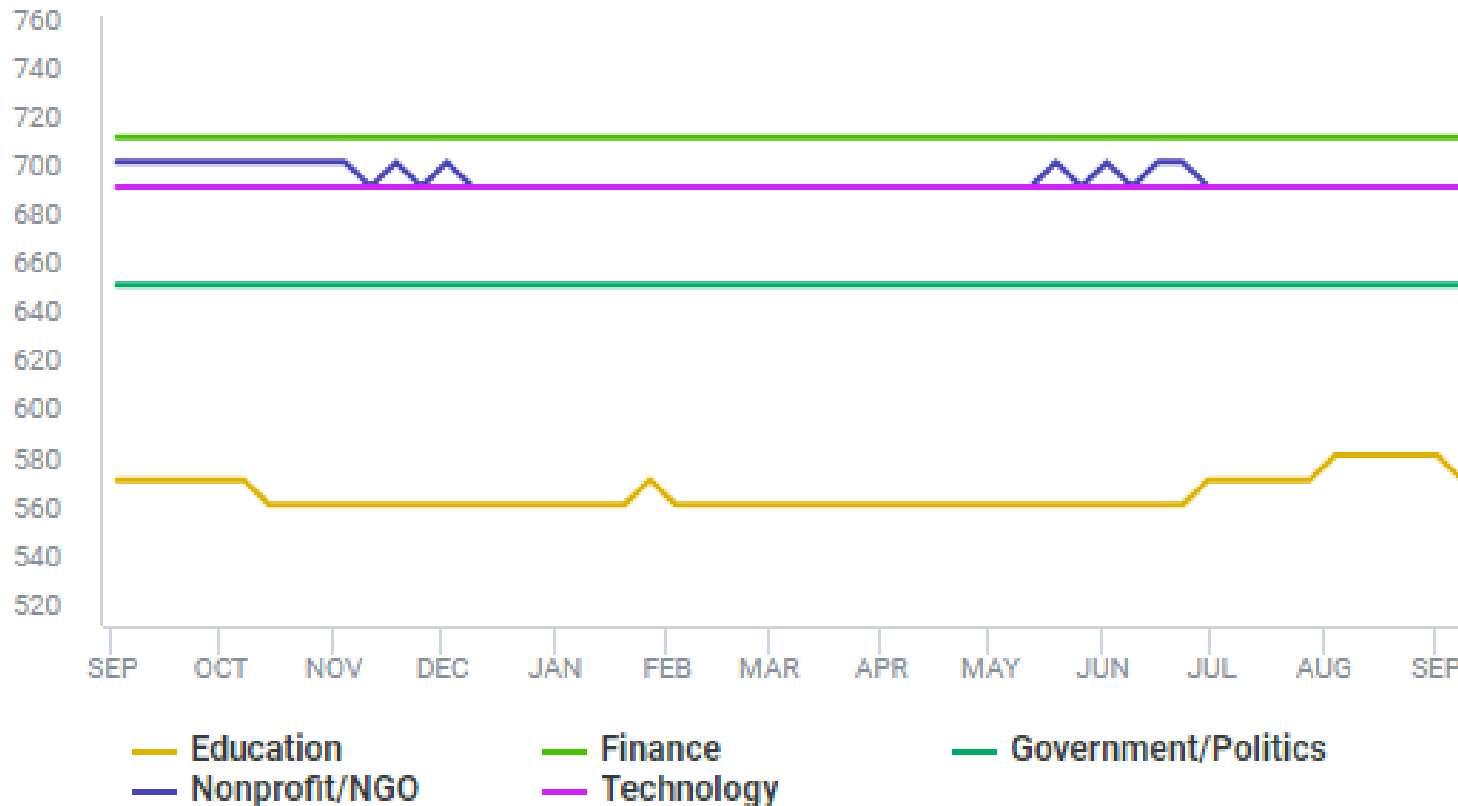
- SOC2 or SOC3 report on the hosting facility
- Completed HECVAT Full or HECVAT Lite
- Copy of the most recent Privacy Policy

# BitSight Industry Ratings

## Industry Ratings

Last 12 months

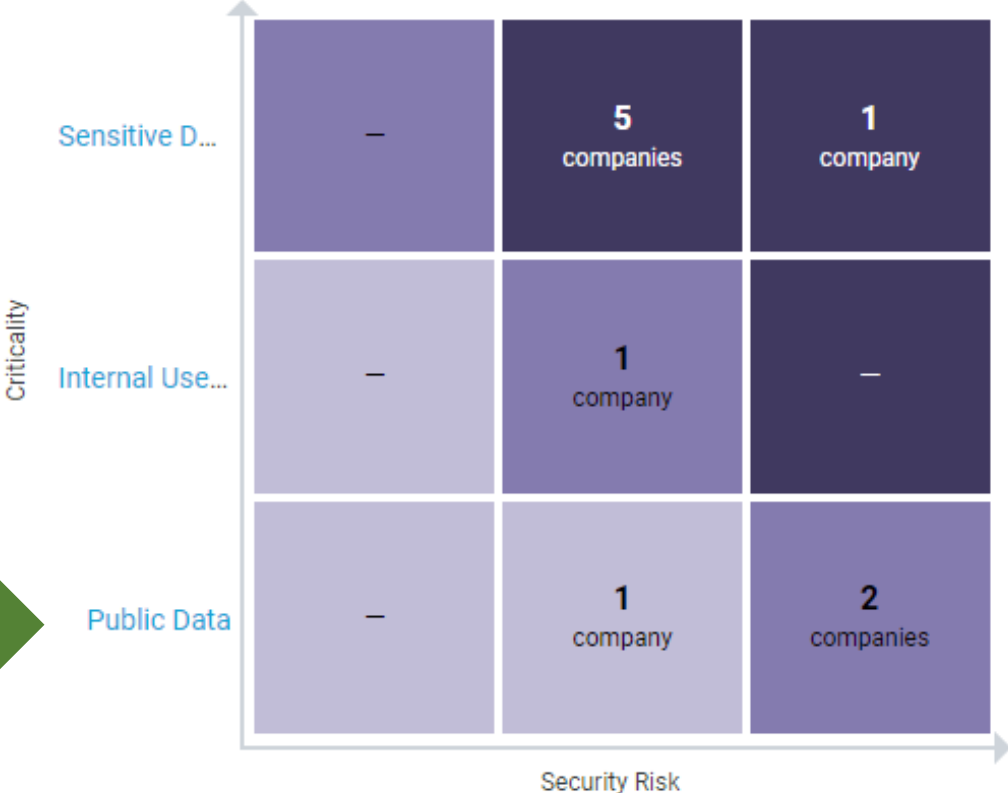
Industry ratings for the 5 most common industries in your portfolio



# 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:

- Phone - 904-620-2015
- Email - [oir@unf.edu](mailto:oir@unf.edu)

