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Card Certification Requirements

1. Card Owner
2. Card Title
3. Card Description
4. Axis Labels
5. Sort Order
6. Hover Values
7. Summary Number & Description
8. Drill Downs
9. Data Audit
10. Data Update Schedule
11. User Access to the right audience
12. Connected Cards
13. Executive Sign-off

Quarterly Card & Page Clean Up

1. Reassign or delete cards without an owner
2. Delete cards that haven't been updated in last 30-60 days (verify first with owner--may have a use case for card with underlying data, need to leave)
3. Delete cards that haven't been viewed in last 30-60 days
4. Delete cards that are ownerless and don't belong to a page—cards that were removed from a page but weren't deleted
5. Add collections to organize pages
6. Lock pages that are ready for production, sharing

Dataset Certification Requirements

1. Dataset Owner
2. Dataset Name (using naming convention)
3. Dataset Description
4. Dataset Update/Trigger Schedule
5. Transforms verified (if applicable)
6. Dataset added to data dictionary (if applicable)
7. Executive Sign-off



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Quarterly Dataset Clean-Up

1. Reassign or delete datasets without an active owner
2. Delete datasets that haven't been updated in last 30-60 days (verify first with owner--- some datasets are static and don't need to be updated or may act as dataflow inputs)
3. Delete datasets that haven't been viewed in last 30 days
4. Delete datasets that are ownerless and don't belong to active cards
5. For data with sensitive information, ensure only those that need to see the data have access to the cards
6. Remove old datasets not updated in last 30-60 days
7. Remove TEMP datasets
8. Identify duplicate datasets and clean out

Dataset Naming Best Practices

- Name top 10 datasets with a * so they show at top of list
- Name every dataset with suffix or prefix: PROD, INT, QA, or TEMP
 - PROD - build cards on this in production
 - INT - intermediary dataset for dataflow. Add PROD dataset to description
 - QA - auditing the data, change to PROD when audited
 - TEMP - used for ad hoc requests and tests; delete quarterly
- Name datasets in a common format (e.g. BU_System_Dept_Suffix)
 - Example: Acme.Salesforce.Sales.PROD

Quarterly User Clean-Up

1. Assign all users to Groups
2. Identify and consider removing inactive users
3. Ensure users have correct Access Rights (Admin, Privileged, Editor, or Participant)