# Data Governance Glossary User Guide

Contents

OVERVIEW

Microsoft Purview is a data governance tool that allows users to catalog data sources and create documentation on reports and business terms.

It is the tool that powers all of the reports available on the datamarq catalog and the report definitions that are available.

[Marquette's Purview Instance](#)

For the purposes of this document, the focus will be on documenting reports and business terms. That can be done in the Glossary
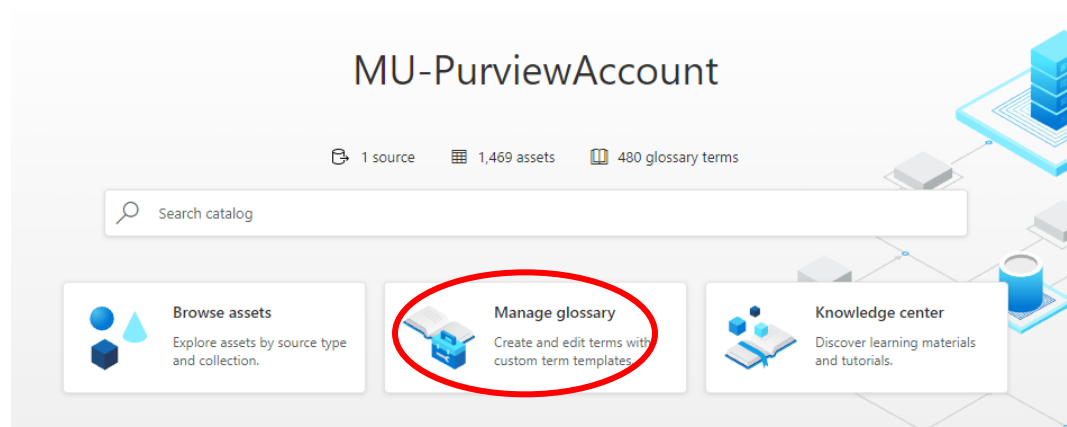
dataMarq Glossary

Viewing Terms

There is only one glossary currently set up for the entire organization. It is called the dataMarq Glossary. All reports and business terms are referred to as "Terms" and can be found under the Terms tab. Terms are organized by functional area, with the functional area as the parent node, and then the Reports and Business Terms

Admissions functional area with **Admissions Reports** and **Admission Terms** sub categories.
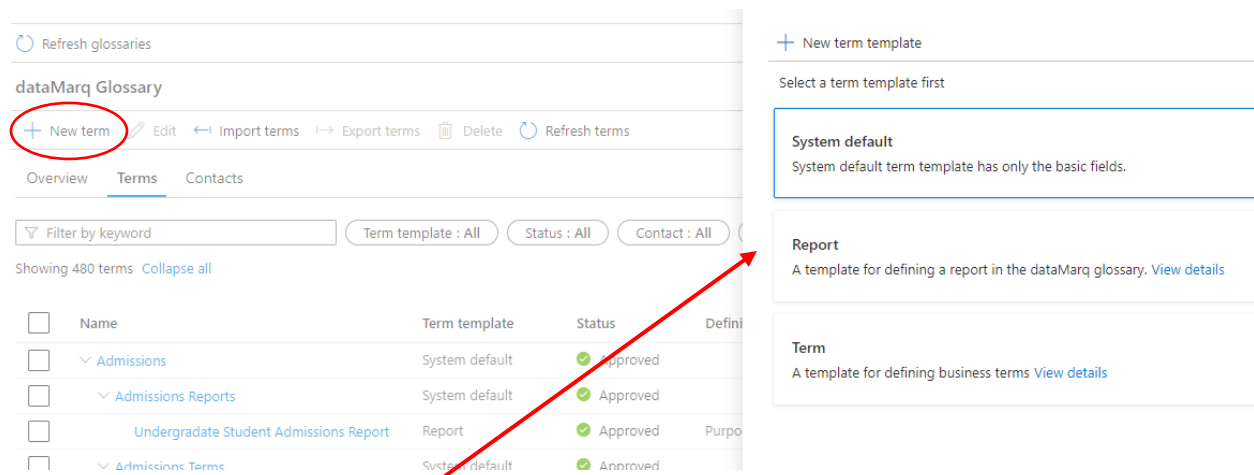
Creating a New Term/Report Definition

To create a new term, click on the **+New Term** button seen below. This will pop up an option to use a template. The systems default will always be selected as that includes fields that are mandatory for all terms. Marquette has two additional templates, one for Reports and one for Terms. Depending on what is being defined, select the appropriate template.

- **System Default Template**: Always selected for all terms
- **Report Template**: For report definitions
- **Term Template:** For all business terms

Adding Business Term or Report Definition

After selecting the **+New Term** button, select the **Term Template** or the **Report Template** This will pop up the new term creation page. Depending on what template you selected, you will see the standard fields along with the template specific fields.

Standard Fields

- **Name:** The report or business term name, this is what will be displayed on all web resources for end users to see.
- **Parent**: The functional area where this term should live (i.e., Admission Terms, OIRA Reports, etc.). This will add the appropriate security.

- **Definition**: The full definition that will be presented for end users. For reports this should be a detailed description of what is available in the report. There are no length limits and text can be formatted, with the formatting carrying through to the datamarq web page.
- **Acronym**: Generally used for business terms (EOP, IPEDS, etc.) but sometimes reports can have an acronym.
- **Resources**: Commonly used for reports, especially if they have a PDF user guide or a video training tool. This section includes a resource name and a link, so it is has to be a linkable resource.

Resources ⓘ	Resource name	Resource link	
			🗑

 + Add a resource

Business Term Specific Fields

- **Functional Area**: The generalized area that aligns with the business term. This could be the name of the term "owner" or it could be a category such as surveys or graduation. If a new dropdown options needs to be added contact the data engineering team.
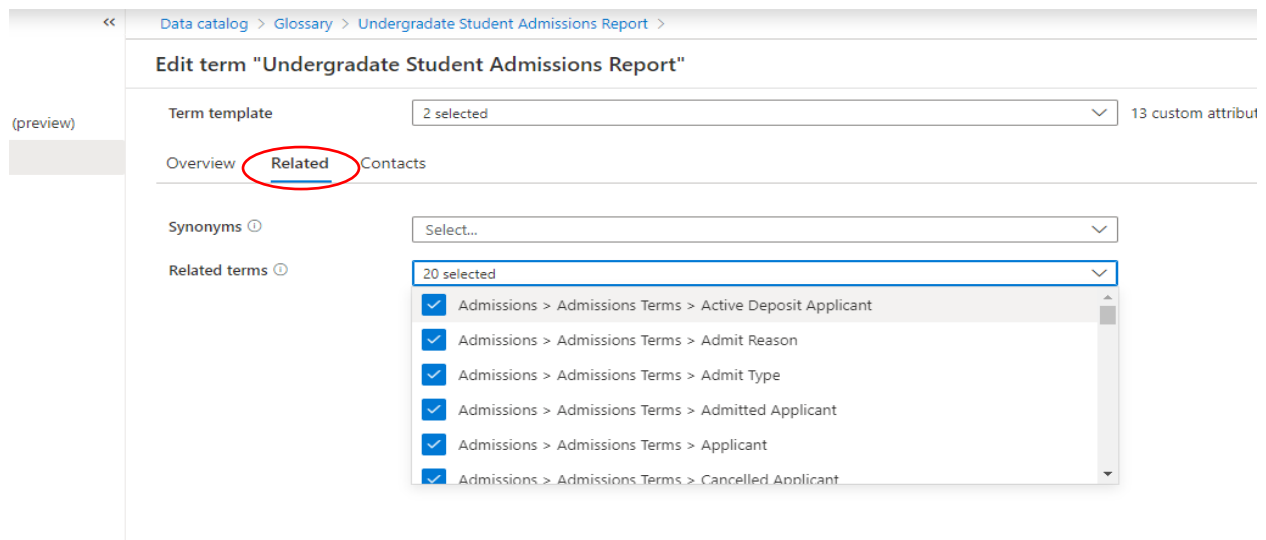
Report Definition Specific Fields

- **Report ID**: This is a critical field for reports as it is the unique identifier of each report in the Marquette "catalog". Report IDs follow the format of the report owner acronym plus a four digit number (OIRA0001, OTR0022, UA0034). The report owner acronyms are pre-established and the report numbers should increment logically. If the report definition is for a subpage of a report, the Report ID should add the letter "**R**" along with an incremented number for each subpage (OIRA0001R1, OIRA0001R2, etc.). If you do not know the correct Report ID contact the data engineering team and they will help identify the correct next id.
- **System ID:** This is an optional field depending on where the report is deployed. If the report is deployed on the Power BI web app (not bi.mu.edu) it will contained in the URL of the report. It is the long id that comes after the **/reports/** tag (app.powerbi.com/groups/89280f64-b4e0-450e-9d66-3d48c314e0c7/reports/**92a893c6-ac43-44e9-b802-38bfd99ca7f6**/ReportSection). This is similar in Tableau.
- **Active:** Yes/No option that indicates if the report definition is currently active or either still in development or decommissioned.
- **Catalog Display:** Yes/No option that indicates if the report should appear on the datamarq catalog. Generally most reports should appear, unless the report is not intended to be shared beyond a very small set of users.

- **Short Description:** A one sentence description of the report that will display in the datamarq catalog tile.
- **Link:** The full url link to the report. Note that these may change if the report locations get moved, but as soon as it is updated in the Purview it will flow through to the catalog.
- **Access:** Public or Restricted
- **Data Range:** A free text entry field meant to describe how much data is available in the report (Previous 3 Years, Latest Term, 2018-Present, etc.)
- **Update Frequency:** A free text field meant to describe how frequently the data in the report gets refreshed
- **Audience:** Optional drop down field to specify if the report is intended for a specific audience. This will appear in the catalog filters. If a new audience needs to be added, contact the data engineering team.
- **Report Owner:** The department responsible for the report. If a new report owner needs to be added, contact the data engineering team.
- **Report Type:** The format of the report (i.e. Power BI, Tableau, Excel, PDF, etc.)

Linking Report Definitions and Terms

For all terms, there is a tab at the top of the term definition page called "Related". This is where you can attach all of the business terms that are used in a report. This is generally where all the terms that are used in a report are selected so they can show on the report definition page on the datamarq website.

Adding related terms is as easy as clicking the related terms dropdown and selected the appropriate terms (NOTE: The terms need to already be defined and created in Purview). Reports and Business Terms can be linked in either the Report Definition or the Term Definition, it does not matter.

Adding Contacts

Similar to linking related terms, there is a tab at the top of every term definition to link contacts. There are two options under contacts:

1. **Experts**
   a. These are Subject Matter Experts who have a comprehensive understanding of the terms/report, how it is defined and can answer questions. For reports, the expert that has "contact" listed in the info field will be listed on the report pages/tiles as the primary contact.

2. **Stewards**
   a. These are functional area leaders who are the "owners" of the report/term and their respective definitions. Generally source system owners, they may or may not be subject matter experts in the specific report or term.

Contacts do not need to be humans, they can be department emails if desired. The only requirement is that there is a valid "@marquette.edu" email associated with the contact.

dataMarq Website

Catalog Tiles

All report definitions that have the **Catalog Display** value of **Yes** will display on the dataMarq Report Catalog. Based on data entered in the Report template fields above, the appropriate data will appear on the report tile (see left).

[dataMarq Report Catalog](#)

If an optional field is not entered in the template, it will not appear on the tile at all.

Key: 🔒 = Restricted Access Report   ⓘ = Information/Resources   ✛ = (

Report Owner
Admissions
Advancement
Athletics
Dental School
Finance
Human Resources
ITS
Library
OIRA
Physicians Assistants
Registrar
Residence Life

Audience
Advisors
Associate Deans
Athletics
Business Managers
Chairs
College Records
Comptrollers
Corporate Engagement
Deans
Directors
Faculty
Fundraisers
General Counsel

Keyword: Enter Keyword

Sort: ☐ Category   ☐ Report Owner

2020 Campus Climate Study Final Report and Interactive Dashboards
Summary of 2020 survey results including key findings, final report, and interactive dashboards.
Report ID: OIRA0038
Report Link: Click Here
Category: Surveys
Report Owner: OIRA
Audience: Associate Deans, Chairs, Deans, Provosts
Access Level: Public
Contact(s): Institutional Research & Analysis, Office of
Data Range: 2020

2020 Campus Cl Results by Colle
Summary of 2020 college/school incl final report, and in dashboards.

Report Definition Page

All reports that are entered in the Microsoft Purview dataMarq glossary will have a report definition page available for use. In most cases, these pages should be linked somewhere within the report for easy access for report users.

Marquette.edu // dataMarq // Report Documentation //

DATAMARQ REPORT DEFINITION

Expand all | Collapse all

Undergraduate Registration Report
Report Owner: OIRA

Description

This report shows how registration for undergraduate students in a particular academic term is progressing.

+ Contacts

+ Resources

+ Full Report Definition

+ Report Glossary

The report definitions can be found at the website:
https://www.marquette.edu/datamarq/reports/report-definition.php

To bring up a specific report's definition on this page, you must pass the parameters of the report id. This will look like the following appended on the end of the url **?report=OIRA0021** with the report id indicating which report to show. So a full url for a specific report definition will look like this:

https://www.marquette.edu/datamarq/reports/report-definition.php?report=OIRA0021

The report definition will also contain these elements, if they exist in the glossary definition:

- **Report Owner**
- **Short Description**
- **Contact**
- **Full Report Description**
- **Report Glossary** (all the terms that are linked)