

New Asset Checklist

JOB
AID

HAPPY DATA™

Phase 1: Data Identification

- ☐ We have completed an initial valuation of the data set.
- ☐ We have identified and reviewed any relevant data governance council resolutions.
- ☐ We have identified the steward(s) responsible for this data asset.
- ☐ We have agreed-upon systems of record for all data comprising this asset.
- ☐ We have communicated any resources we required from the data steward to that steward during project onboarding.

Phase 2: Evaluation & Planning

- ☐ We have performed a technical continuity assessment, and we know what is needed to ensure continuity of service.
- ☐ We have performed a data quality assessment.
- ☐ We have performed a data security and privacy assessment.
- ☐ We have reviewed all existing standards and policies related to this data set and its uses.
- ☐ We have identified all relevant metadata for this dataset and have included this metadata in our requirements gathering with our steward(s).
- ☐ If we find significant quality, security, privacy, or other issues, we have put these issues on the list for remediation.
- ☐ We have drafted dataflow diagrams showing the movement of the data from the system of record.
- ☐ We have drafted a continuity plan to ensure technical work does not interfere with continuity of service.
- ☐ We have drafted a plan for connecting each system of record for this asset to the data virtualization platform.
- ☐ We have drafted a quality assurance (QA) plan to test our implementation before moving to production.
- ☐ We have created a plan to apply relevant security and privacy rules to our implementation.

Phase 3: Staging

- ☐ We have staged the data catalog with the agreed-upon metadata.
- ☐ We have staged the physical views in the development environment.
- ☐ We have gathered QA results (including customer feedback).
- ☐ We have staged the data virtualization scheduler.

Phase 4: Deployment & Abstraction

- ☐ We have communicated the readiness of the data assets for use to stakeholders.
- ☐ We have published all relevant data catalog updates.

- ☐ We have published logical views in the data virtualization platform.
- ☐ We have shut off redundant connections to this data from other systems.
- ☐ We have created a plan for ongoing monitoring and maintenance.