

## The Report Certification Process

Report certification can be requested after the development of a report/dashboard (i.e., the report/dashboard is published or provided to the requestor) or later.

1. A member from a Governance Committee, the Data Reporting Communications Group, or ITS submits a Catalog and Report Certification Request ticket from the [Data Governance website](#) or from the [6Tech Online Service Portal](#).

When submitting a ticket for report certification, there are the following options:

- To request certification for a new report/dashboard that has not been cataloged.
- To request certification for a report/dashboard has been cataloged.
- To request certification for a previously certified report/dashboard that is cataloged and has an update (needs to be re-certified).

Note: An update includes a major change to the metrics or functionality of the report (i.e., new metric(s) added, metric(s) removed, a new page is added to a dashboard, etc.).

2. After the ticket is submitted, it will be assigned to the Reporting Metadata Specialist (RMS). The RMS will initiate communication with the requestor to gather information about the report/dashboard.
3. The RMS will confirm that the report/dashboard meets the Report Certification Criteria\*.
4. The RMS will verify with the requestor that the report/dashboard was validated at time of development. If validation was not completed, the requestor, report developer, and the report's client (who requested the report) will work together to validate the report. The report certification process will remain on hold until the step is completed and will continue after the RMS is notified of completion. There are four steps in validation that the RMS will be confirming:
  - Data pull review. How were the data pulled from the source systems and is that methodology correct?
  - Report logic review. Were the calculations created from the raw data calculated correctly?
  - Design logic review. Does the report make sense in how it is displaying the data?
  - Client review. Are the initial questions answered? Does the data pull, report logic, and design logic meet the client's needs?

5. The RMS will confirm if the report follows the Report Authoring Guidelines\*\*. If they have not, the RMS will notify the requestor or report developer to update the report to adhere to the guidelines based on the report's output type. The report certification process will remain on hold until the step is completed and will continue after the RMS is notified of completion.
6. The RMS will verify that the report/dashboard is cataloged. If it is cataloged, the RMS will work with the requestor or report developer to confirm the catalog record is accurate and complete. If it is not cataloged, the RMS will work with the report developer to catalog the report/dashboard and confirm it is accurate and complete.
7. The RMS will verify with the requestor that the metrics (measures and report attributes) are accurate and complete. This includes the correct use of terms, definitions, and security classification. If the report/dashboard is new and requires cataloging, is missing metrics, or requires an update to the metrics, the Data Quality Specialist will identify metrics and work with the requestor or report developer to define them.
8. The RMS will verify with the requestor that the report/dashboard's lineage is accurate and complete. If it is not accurate, the RMS or Systems Metadata Specialist will update the lineage.
9. The RMS will confirm with the requestor that the steps have been completed. The RMS will update the catalog record in Collibra to the status Certified. A green badge will appear on the asset in Collibra. A report/dashboard is not officially certified unless the green badge exists on the catalog record in Collibra. The requestor or report developer may then add a "certified" indicator to the report/dashboard.
10. The RMS will attach a completed checklist to the ServiceNow ticket containing confirmation details for each step and close out the ticket.

*\*The Report Certification Criteria was identified by the Report Certification Working Group in 2023. A report/dashboard must meet one or more of the following to qualify for certification:*

- *The report supports business decision making and/or key business processes, regardless of frequency.*
- *The report supports administrative decision making; and/or*
- *The report is used as a source for answering public information requests.*
- *The report is not described above but is in Data Central.*

*\*\*The Report Authoring Guidelines were identified by the Report Authoring Working Group in 2023. The guidelines identify descriptive information that must accompany a report/dashboard.*