# Getting Started with MyDataWork

*Be ready for any question. Any time.*

## Sound familiar?

*Your boss walks over: "What are you working on this week?"*

You have five browser tabs open, three Excel models in progress, and a Power BI dashboard you haven't touched in two days. You know the answer — but pulling it together takes a moment you don't have.

*Or your internal customer sends a message: "Any progress on the quarterly forecast?"*

You're on top of it. But are you ready to not just answer — but to share a fresh insight, flag a dependency they didn't know about, or propose something that would actually improve their outcome?

**MyDataWork is built for exactly these moments.**

It gives data workers — analysts, engineers, BI developers, data scientists — a live view of everything they're working on, how it all connects, what it means for the people who depend on their work, and what they should do next.

## What MyDataWork Does

MyDataWork reads the metadata from your work assets — not the contents, just the facts about them:

- File names and paths
- File types and tools (Excel, SQL, Python, Power BI, Alteryx, Tableau...)
- Folder structure and organization
- Last modified dates
- Cloud-based assets from GitHub, dbt Cloud, Databricks, and Snowflake
- How assets relate to each other

From metadata alone, MyDataWork can tell you which Excel models feed which Power BI dashboards, which SQL scripts populate which reports, which Alteryx workflows process which source data, and how your entire data landscape is connected — without reading a single byte of your actual file contents.

Asset metadata is the map of your data landscape. MyDataWork reads the map so you can navigate with confidence.

Your file contents stay private. Always.

# Step 1 — Start with Demo Data

On first login, the setup wizard opens automatically. Click Use demo data to instantly populate your workspace with 9 pre-loaded assets representing a realistic analytics environment.

**No installation needed. No files to connect. You're ready to explore in seconds.**

The rest of this guide walks through every feature using these demo assets — so you can see exactly what MyDataWork looks like before connecting your own work.

| Asset | Tool | What it represents |
|---|---|---|
| assumptions.xlsx | Excel | Core model assumptions and parameters |
| forecast_inputs.csv | CSV | Raw data feeding the forecast model |
| forecast_notes.ipynb | Python | Analysis and commentary on forecast results |
| model.sql | SQL | Database queries powering the model |
| kpi_definitions.csv | CSV | Definitions of key performance indicators |
| reporting_template.xlsx | Excel | Output template for stakeholder reports |
| pipeline_config.sql | SQL | Data pipeline configuration |
| dashboard_notes.ipynb | Python | Dashboard design and logic notes |
| ManufacturingDemandForecast_v3.yxmd | Alteryx | End-to-end forecasting workflow |

# Exploring MyDataWork with the Demo

## Assets — Your Live Catalog

Open the **Assets** tab. You'll see all 9 demo assets listed, each with its tool type and support level badge.

Click **model.sql**. In the right panel you'll see:

- The asset's path and file type
- **Data sources detected** — the SQL tables this query touches (e.g. dw.sales_orders)
- **Related assets** — other files that share data sources or topics
- **Lineage preview** — a miniature map of how this file connects to others

Click **forecast_inputs.csv**. Notice it shows column names extracted from the file — MyDataWork reads the structure without reading the data.

**Support levels** tell you how well-understood each asset is:

- **L1** — Indexed (name and path known)
- **L2** — Data sources detected (MyDataWork has identified what data this asset uses)

This is what your own Assets tab will look like once you connect your folders or cloud sources.

## Use Cases — Connect Work to Outcomes

Open the **Use Cases** tab. You'll see two demo Use Cases: *Weekly sales reporting automation* and *Improve S&OP forecast accuracy*.

Click **Weekly sales reporting automation**. In the right panel, explore the tabs:

- **Overview** shows the title, description, status, priority, estimated value ($80,000), and realized value ($20,000). Below that, Communication events — a log of who was informed and when.
- **Assets & People** shows which assets are linked and which stakeholders depend on it.
- **Recommendations** shows AI-generated suggestions based on the Use Case. (Requires AI enabled in Setup.)
- **Action Plan** lists the next steps needed to move this Use Case forward.

This is the structure you'll use for your own projects — each Use Case becomes the single source of truth for a deliverable.

## Goals & Progress — Measure What Matters

Still in the *Weekly sales reporting automation* Use Case, click the **Objectives & Progress** tab.

You'll see:

- **Objective:** "Automate weekly sales reporting to reduce manual effort and deliver consistent KPI visibility. Target 4 hours saved per week."
- **Progress measurements:** Baseline: 4 hours | Current: 1 hour | Target: 0 hours
- **Progress bar:** Calculated automatically — "4 hours → 1 hour (now) → 0 hours (target) = 75%"
- **Progress notes:** "Pipeline automated. Dashboard now refreshes automatically each Monday."

This is the pattern to follow for your own Use Cases. When you create one:

1. Write your objective in plain language
2. Set the baseline before the work changes anything — this is only accurate once
3. Define a specific, measurable target
4. Update the current value as work progresses

The progress bar does the math. Your stakeholders see a number, not a guess.

## AI Recommendations — Surface What You Might Miss

In the *Improve S&OP forecast accuracy* Use Case, click the **Recommendations** tab.

AI Recommendations analyzes your Use Case description, linked assets, and progress notes to surface ideas grounded in your actual work — not generic advice.

*For example: “kpi_definitions.csv is referenced by both this Use Case and the weekly sales reporting Use Case — a change to KPI definitions could affect both. Consider coordinating changes and linking the asset to both Use Cases.”*

That's a connection a human might miss but metadata makes obvious.

To enable: go to **Setup** → **AI Assist** → **Enable AI**. An OpenAI API key is required (admin only).

## Lineage — See How Everything Connects

Open the **Lineage** tab.

You'll see a visual map of how the demo assets connect. **forecast_inputs.csv** feeds **model.sql**. **model.sql** connects to **forecast_notes.ipynb**. **kpi_definitions.csv** connects to both the forecast model and the reporting template.

This map was built automatically from file metadata — no manual diagramming, no documentation to maintain.

Now imagine this map built from your own files. When a data engineer asks "which SQL scripts depend on this table being changed?" — you open Lineage and trace the answer in seconds.

Use Lineage to:

- Understand the impact of changing an asset upstream
- Trace data flow from source to output
- Onboard new team members to your data environment
- Identify orphaned assets with no connections

MyDataWork also surfaces external dependencies — data sources your files reference that are not currently in your catalog. Enable "Show external dependencies" in the Lineage tab to see these as ghost nodes, or look for amber "Not in catalog" badges next to data sources in the Assets tab. These represent invisible risks worth investigating.

## Portfolio — Show What You Own

Open the **Portfolio** tab.

You'll see a summary across both demo Use Cases: total estimated value and total realized value. Select which Use Cases to include and export as PowerPoint or PDF — a clean stakeholder document that requires no app access to read.

Use it before important meetings, performance conversations, or team reviews. A portfolio export prepared in advance signals a level of organization and insight that stands out.

## Insights & Leverage

The **Insights** tab shows patterns across your asset catalog — which tools dominate, which assets are most active, how your workspace has grown.

The **Leverage** tab helps you identify which Use Cases and assets have the highest potential impact — and where you might be underinvesting or relying on fragile single points.

## Leverage — Four Ways AI Can Help You Go Further

The Leverage tab offers three AI-powered analysis modes. Select use cases from the list and click Generate in any mode to get started. All three require AI to be enabled in Setup → AI Assist.

**Find reuse opportunities —** Identifies where your use cases overlap and surfaces consolidation ideas. Useful when you suspect you have redundant work across projects or team members.

**Identify automation candidates —** Analyzes your use cases and assets to find specific processes that could be candidates for intelligent automation. For example: a weekly SQL refresh that feeds a dashboard, a recurring file transformation, or a reporting pipeline that runs on a fixed schedule. Each opportunity includes an estimated value, complexity rating, and a suggested next step. You can share any opportunity via email to a colleague or manager directly from the app. All opportunities are saved so you can revisit them without regenerating.

**Discover marketplace data —** Recommends external datasets from your cloud providers (AWS, Google Cloud, Snowflake, Azure, Databricks) that could improve your use cases. To use this mode, first configure your cloud providers in Setup → Cloud Providers. Recommendations are saved and can be dismissed if not relevant.

**Migration Assist** — Analyze individual assets or complete use case workflows to identify opportunities to migrate or modernize your tools. Select files grouped by tool type for a targeted assessment, or select a use case to evaluate its entire asset ecosystem end-to-end. Results include recommended alternatives, effort estimates, expected benefits, confidence ratings, and a concrete suggested next step. Useful when you want to build the case for modernizing a specific workflow or tool before bringing the conversation to your manager or IT team. Results are saved and shareable via email.

## People — Track Your Stakeholders

The **People** tab is your stakeholder directory. The demo includes pre-loaded stakeholders linked to each Use Case.

When stakeholders are linked to Use Cases, you always know who depends on what and who to notify when something changes.

## MyDataWork Assistant — Ask Anything, Any Time

A teal chat button in the bottom-right corner of every screen opens the MyDataWork Assistant. It knows which tab you are on and has context about your workspace — your assets, use cases, and plan — so it can give you specific, relevant answers rather than generic help.

Ask it things like:

- "What should I do next to get more value from this tab?"
- "How do I link an asset to a use case?"

- "What does the Lineage tab show me?"
- "How many assets do I have and what types are they?"

The Assistant draws from the same daily AI quota as other AI features. If your quota is exhausted for the day it will let you know, and the quota resets the following day.

# A Day in the Life

*This scenario demonstrates how MyDataWork transforms daily analytical work from reactive to strategic — follow along in your own workspace*

**7:45am** — Check MyDataWork on your phone during commute. Executive dashboard in Insights tab shows portfolio at 82% realization rate across 5 active use cases. One use case flagged for progress update - customer segmentation model needs current value refresh.

**8:30am** — At desk, Assets tab shows overnight updates via cloud sync: two dbt models refreshed, one Python notebook modified. File relevance filtering (Active files view) highlights the important changes while keeping 50+ older reference files organized but out of the way.

**9:15am** — Manager stops by: "How's the customer segmentation project progressing?" You click the use case, show progress: 65% complete (baseline: manual Excel process taking 8 hours/week → current: 3.2 hours → target: 1 hour). Value measurement template shows quality improvement: error rate reduced from 15% to 8%, target 5%. Share linked assets (3 Python notebooks, 2 SQL scripts, 1 Tableau dashboard) and recent progress notes. **Total time: 45 seconds with quantified data, not estimates.**

**10:00am** — Click "Suggest (1 credit)" for AI use case recommendations. AI analyzes your workspace and suggests "Automate Monthly Forecast Reconciliation" - identifies recurring Excel pattern across 4 files, estimates 12 hours/month savings, medium complexity. Creates use case with one click, auto-links relevant assets.

**10:30am** — Data engineering Slack: "Which reports depend on customer table modification this afternoon?" Open Lineage tab, search "customer," trace visual connections immediately. Impact: customer_analysis.sql feeds segmentation_model.py which populates the executive dashboard. Flag 3 affected stakeholders before changes begin. **Response time: 90 seconds with complete impact analysis.**

**11:45am** — Use Leverage → Identify automation candidates. AI surfaces specific opportunity: "Weekly KPI email generation" involving manual Excel export + email composition. Estimated value: $15K annually, low complexity, suggests Python automation. Share finding via email directly to manager with AI-generated business case.

**1:30pm** — Internal customer emails: "What's the forecast accuracy improvement status?" Check use case Objectives & Progress: shows measurement (forecast error: 12% → 9% → 6% target), latest notes about new data source integration, timeline on track. Push structured update to linked Jira ticket including current measurements and next milestones. **Professional response in 2 minutes.**

**2:15pm** — Discover external weather data could improve demand forecasting. Add to Assets, link to use case, update progress notes. AI Recommendations immediately flags this data source as relevant to colleague's supply chain optimization model. Message them about reuse opportunity - preventing duplicate data acquisition.

**3:00pm** — Team meeting: "What should we automate next quarter?" Export Leverage analysis results: 5 automation candidates with effort estimates, value calculations, and confidence ratings. Data-driven prioritization discussion instead of opinion-based. Meeting productivity increases significantly with prepared analysis.

**4:15pm** — Archive completed proof-of-concept use case to keep active workspace focused. Use value measurement templates to capture final metrics: 40% time savings achieved, 60% error reduction, $22K realized value vs $30K estimate (73% realization rate). Professional closure documentation.

**4:45pm** — Prepare for tomorrow's executive meeting. Export portfolio: clean PowerPoint showing $425K estimated value across 5 use cases, $180K already realized, 23 hours/week time savings, comprehensive risk reduction metrics. **Generated in 30 seconds, ready for C-suite presentation.**

**5:00pm** — Update current values for 2 in-progress use cases. Progress bars recalculate automatically. Check AI status: 2/5 credits remaining. Set stakeholder notification for Monday milestone.

**End of Day** — Complete visibility: know exactly what you worked on, how it connects to business outcomes, what's progressing well, what needs attention, and what's next. Manager has real-time portfolio visibility. Stakeholders have confidence in professional progress tracking. Team has context for seamless collaboration.

### Key Transformation: Reactive → Strategic

**Before MyDataWork:**

- Reconstruct status from memory and scattered files
- Estimate progress and value impact
- Search through folders to answer impact questions
- Manual documentation and stakeholder updates

**With MyDataWork:**

- Live, quantified record always ready to share
- Every question becomes opportunity to demonstrate value
- Proactive identification of automation and reuse opportunities
- Professional executive communication with comprehensive metrics

# Tips for Getting the Most Value

- **Set a baseline when you start a Use Case.** The baseline is only accurate once — at the beginning. Record it before the work changes anything.
- **Update your current value regularly.** The progress bar is only as good as the data behind it. A 30-second update tells a much better story than a static estimate.
- **Let MyDataWork check your numbers.** If a use case value looks significantly different from your others, a small prompt will appear asking you to confirm it. In the Portfolio tab, watch for the value distribution note — when mean and median diverge, one use case may be pulling your total away from a realistic picture. These are gentle checks, not errors. They are there to help you present numbers you can stand behind.
- **Document Use Cases as you go.** Even a one-line description makes a huge difference when you're asked about it three weeks later.
- **Check AI Recommendations after adding new assets or Use Cases.** The suggestions improve as your workspace grows.
- **Export your portfolio before important meetings.** Prepared context signals organization and insight.
- **Use Rescan now when you've made big changes.** The Connector runs every 5 minutes automatically, but Rescan now picks up changes immediately.
- **Use the Assistant when you're not sure what to do next.** The teal chat button in the bottom-right corner is always available. It knows your workspace and can suggest your next best action based on what you have set up.
- **Check Leverage after you have three or more use cases.** The AI analysis becomes more meaningful with more context. Run "Identify automation candidates" to surface opportunities you might not have considered, and share the results with your manager or IT team as a conversation starter. Also try Migration Assist if you suspect certain tools in your workflow could be replaced by something more efficient or scalable. The confidence ratings help you understand how well-established each recommendation is before you invest time evaluating it.
- **Use Migration Assist when a tool feels like it might be past its prime.** Select the assets involved and let MyDataWork surface alternatives with effort estimates and confidence ratings — so you can walk into that conversation prepared rather than speculating.
- **Advanced Value Demonstration:**
  - Use value measurement templates for credible ROI beyond dollars
  - Archive completed projects to maintain portfolio focus while preserving metrics
  - Export portfolio before key meetings - signals organization and strategic thinking
  - Leverage AI automation candidates for quarterly planning discussions
- **Executive Communication:**
  - Executive dashboard (Insights tab) provides portfolio overview for leadership
  - Use comprehensive value metrics (time, quality, efficiency, risk) not just monetary
  - Progress measurements create accountability and demonstrate systematic improvement
  - Portfolio exports generate professional stakeholder documentation instantly
- **AI Feature Optimization:**
  - Your first use case suggestion is free - try it to see quality
  - Use Leverage analysis after you have 3+ use cases for meaningful patterns
  - AI Assistant knows your workspace - ask specific questions about your actual assets
  - Purchase additional credits strategically for important analysis periods

# Frequently Asked Questions

### Does MyDataWork read my files?

No. Only file names, paths, types, sizes, and modification dates are collected — never file contents. Cloud source connectors read only asset metadata exposed by each platform's API.

### What file types are supported?

Excel (.xlsx, .xlsm), CSV, SQL scripts, Python notebooks (.ipynb, .py), Tableau (.twb, .twbx), Power BI (.pbix, .pbit), and Alteryx (.yxmd). Cloud sources add GitHub repos, dbt Cloud models, Databricks notebooks, and Snowflake tables and views.

### How often does the Connector scan?

Every 5 minutes automatically. Use Rescan now in the Setup tab for an immediate scan.

### What are cloud sources?

Cloud sources connect GitHub, dbt Cloud, Databricks, or Snowflake directly using an API token — no installation required. Assets appear alongside local file assets in the Assets tab.

### How does progress tracking work?

In the Objectives & Progress tab of any Use Case, set a baseline, current value, and target. MyDataWork calculates progress automatically and displays a progress bar. Update the current value as your work progresses.

### How does AI Recommendations work?

MyDataWork sends your Use Case descriptions, objectives, progress notes, and asset metadata to an AI model — never file contents. Enable it in Setup → AI Assist. Solo and Early Access users get 5 AI calls per day and 25 per week. Team plan users get 20 per day and 100 per week.

### Can I export my work?

Yes — export Use Cases, your full portfolio, or your data lineage map as PowerPoint or PDF documents.

# Step 2 — When You're Ready: Connect Your Own Assets

Once you've explored the demo and seen how MyDataWork works, here's how to transition to your own files and data.

**First, remove the demo data:**

1. Go to the Setup tab
2. Click Remove demo data
3. Your workspace is now clean and ready

**Option A — Local files:**

Click **Connect folders** or **Run setup wizard** from the Assets tab. Download and install the MyDataWork Connector for Windows — a small background program that runs silently on your PC. Enter your setup code when prompted and choose the folders where your work files live. Your files appear in Assets automatically within a minute.

- To add more folders later: click **Connect folders** in the Assets or Setup tab
- To pick up recent changes immediately: click **Rescan now** in the Setup tab
- Cloud-synced folders (OneDrive, Google Drive, Dropbox) are fully supported

**Option B — Cloud sources:**

Go to **Setup** → **Cloud Sources** and enter your API token for GitHub, dbt Cloud, Databricks, or Snowflake. No installation required. Your cloud assets appear in Assets alongside any local files.

**Option C — Configure your cloud providers for data marketplace recommendations:**

If you want MyDataWork to recommend external datasets that could enrich your work, go to Setup → Cloud Providers and check the cloud platforms your organization uses. This takes less than a minute and unlocks the "Discover marketplace data" mode in the Leverage tab.

Everything you learned from the demo applies directly to your own work. The structure is the same — only the assets change.

***MyDataWork — Know your data. Be ready for anything.***