

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, ThoughtSpot TML, Dataiku project zips, Looker LookML...)
- Warehouse-cataloged work products from tools that write into Snowflake or Databricks — including dbt models, Sigma views, Hex datasets, Dataiku outputs, DataRobot predictions, Alteryx workflow results, Matillion pipelines, and Fivetran/Airbyte landing tables
- Folder structure and organization
- Last modified dates
- Cloud-based assets from GitHub, dbt Cloud, and your data warehouses (Snowflake, Databricks) — which also catalog the work products of tools that write into them, including dbt models, Sigma views, Dataiku outputs, DataRobot predictions, and more
- 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 with three paths: Use demo data, Connect local files, or Connect cloud sources. Click Use demo data to instantly populate your workspace with 19 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_exec_dashboard.pbix	Power BI	Executive KPI dashboard built on the forecast outputs
recurring_report.sql	SQL	SQL that builds the weekly sales report
sales_dashboard.twb	Tableau	Tableau dashboard delivering the sales report to leadership
weekly_refresh.py	Python	Python script that refreshes the report data each week
ManufacturingDemandForecast_v3.yxmd	Alteryx	End-to-end forecasting workflow
customer_master.sql	SQL	Cross-functional master query — linked to 3 use cases (Weekly Sales, Customer 360, Quarterly KPI). The Assessment flags this kind of cross-UC infrastructure asset as something to coordinate before modifying.
customer_360_master.sql	SQL	A second canonical customer master query paired with customer_master.sql — the near-duplicate the Assessment's reuse-mode analysis catches as a consolidation candidate.
account_health_pbi.pbix	Power BI	Account-health dashboard for the Customer 360 reconciliation reduction use case.
kpi_data_load.sql	SQL	Refresh SQL feeding the Quarterly Executive KPI delivery use case.

Asset	Tool	What it represents
crm_extract.csv	CSV	Recently-added CRM extract not linked to any use case — the Workspace Agent's 'new asset without a UC home' rule picks this up.
nps_responses.csv	CSV	Another recently-added unlinked CSV — same Workspace Agent pattern.
inventory_v2.xlsx	Excel	Inventory model for the Inventory turn analysis modernization use case (which carries a large realization gap the Dashboard's Value distribution panel surfaces).
inventory_dashboard.twb	Tableau	Tableau dashboard for the Inventory turn analysis modernization use case.
campaign_roi.xlsx	Excel	Marketing campaign ROI model — the workhorse asset for Marketing campaign ROI tracking (\$0 realized of \$25K estimated — the most stalled use case in the demo).
legacy_forecast.xlsx	Excel	Older forecast model not linked to any active use case — the orphan-asset story the Assessment reports.

Demo data is reversible. You can remove it any time from Setup → Connect your data ("Remove demo data" button), and reload it from the same spot if you change your mind. The Dashboard also surfaces a "Load demo data" button on its empty state. Removing demo doesn't affect any real assets you've connected.

Exploring MyDataWork with the Demo

The Dashboard — your at-a-glance view

The Dashboard tab opens first every time you visit your workspace. With the demo data loaded, you'll see six panels populated against the demo estate — 19 assets across 7 tool families and 6 active use cases:

Use case staleness — your 6 demo use cases bucketed by how recently they were updated.

Portfolio totals — estimated and realized value across the demo's active use cases, with realization rate.

Stakeholder coverage — how many of the 6 use cases have an assigned stakeholder.

Value distribution — realized values plotted against the workspace mean and median.

Tool distribution — asset count by tool family. The demo includes SQL, Excel, Python, Power BI, Tableau, Alteryx, and CSV files.

Workspace Agent activity — suggestions surfaced and acted on in the last 14 days.

A small demo / real toggle in the upper-right lets you flip between the demo view and your real-data view (once you connect real assets). The toggle is dashboard-only and doesn't affect what's shown in Assets, Use Cases, Suggestions, or the Assessment.

Assets — Your Live Catalog

Open the Assets tab. You'll see all 19 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 (raw.orders and 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 **kpi_exec_dashboard.pbix**. This is a Power BI report — MyDataWork catalogs BI tools the same way it catalogs scripts and spreadsheets. Notice the data source it draws from, and the Related assets and Lineage preview that connect it back to the workflow feeding it. When you connect your own files, MyDataWork goes further — reading column names from CSVs and tables referenced in SQL, all from structure alone, never file contents. The detail panel also shows the file's size (formatted KB/MB/GB) and creation date — handy when you're sizing up a folder of unfamiliar files or recalling when a file first appeared.

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)

File relevance filtering helps you focus on current work. In the Assets tab, the filter selector offers four views:

- **Current (30 days)** — files modified or accessed recently; your active work
- **Recent (30-90 days)** — files from 1-3 months ago
- **All files** — complete catalog access with no filtering
- **Archived (90+ days)** — historical files not recently updated

The default view is Current, keeping your active work in focus while archived files remain accessible whenever you need them.

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

Asset state badges help you spot issues at a glance. Three states may appear next to an asset:

- **Removed** (red, when you've manually removed an asset from your workspace)
- **Infrequent** (yellow, when an asset hasn't been updated in approximately 90+ days)
- **Source unreachable** (orange, when the Connector tried to scan an asset but couldn't reach its source — often because a network share is disconnected or VPN dropped). The Source unreachable badge clears automatically when the next scan succeeds.

Use Cases — Connect Work to Outcomes

Open the Use Cases tab. You'll see six demo Use Cases: Weekly sales reporting automation, S&OP forecast accuracy improvement, Customer 360 reconciliation reduction, Quarterly executive KPI delivery, Inventory turn analysis modernization, and Marketing campaign ROI tracking. Each captures a different shape of demand on your work — a recurring automation, a forecast-accuracy improvement, a customer-data unification, a cross-functional executive cadence, a tooling modernization, and a new measurement program. The Dashboard and Assessment react to this distribution: which use cases are stalled (Marketing campaign ROI is \$0 realized of \$25K estimated), which carry the largest realization gaps (S&OP forecast at 17% realization, Inventory turn at 14%), and which share assets cross-functionally (customer_master.sql appears in three of them).

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. The Overview tab also has a Notes URL field — paste a Google Doc, Notion page, or any HTTPS link where you keep notes for this use case. An “Open notes” button appears in the panel when set.
- **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 S&OP forecast accuracy improvement 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_exec_dashboard.pbix is linked to both this Use Case and the weekly sales reporting Use Case — a change to the dashboard could affect both. Consider coordinating changes so the two efforts stay aligned.”

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. Four assets feed into **ManufacturingDemandForecast_v3.yxmd** — **forecast_inputs.csv**, **assumptions.xlsx**, **model.sql**, and **forecast_notes.ipynb**. The Alteryx workflow in turn feeds **kpi_exec_dashboard.pbix** and **weekly_refresh.py**. From there the chain continues: **weekly_refresh.py** feeds **recurring_report.sql**, which feeds **sales_dashboard.twb**. One workflow at the center, the analytical inputs on one side and the reporting outputs on the other.

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 the six 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 four AI-powered analysis modes. Select use cases from the list and click Generate in any mode to get started. All four 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.

Asset Estate Assessment — an on-demand AI review of your workspace

The Asset Estate Assessment is available in the Setup tab. Free regardless of plan — one free assessment per email, forever.

With the demo loaded, click View demo assessment at the top of the Assessment card to see the report format: 5 sections (Estate overview, Connections worth making explicit, External dependencies, Use case opportunities, Health observations) plus a Concrete next actions list. The demo runs in seconds and costs nothing — it's a curated example using the same template the real run produces.

When you're ready to run against your own workspace, click Run my free assessment. You'll need at least 2 active use cases — the assessment is use-case-driven. The result is rendered inline and exportable to PDF. The PDF carries your workspace name, who it was generated for, and the timestamp.

The assessment is designed to read like a senior analyst's audit, not a generic checklist. Every finding names specific assets, use cases, or stakeholders from your workspace — template phrasings like "Consolidate your KPI dashboards" or "Merge your forecasting models" are dropped during synthesis because they could apply to any workspace.

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.

Working with a Team — For Team Plan Workspaces

If you're using MyDataWork on a Team plan, your workspace uses a shared bulletin board model. Each team member has their own personal workspace where their assets are private by default. When you're ready to share an asset with the team, click "Share to Team" on the asset's detail panel — it appears in the team's Shared tab where other members can browse it. If a colleague finds it useful, they can click "Copy to mine" to bring an independent copy into their own workspace.

Each member's workspace stays their own. Use cases, lineage, stakeholders, and Insights all remain personal — only assets are shareable. The person who shared an asset (or the team admin) can unshare it at any time; copies others have already made are unaffected.

This way, you can connect your full working folders without worrying about exposing drafts or work-in-progress, while still surfacing the work that's ready for the team.

Team Metrics for admins: Team admins see a Team Metrics panel in the Workspace management section showing total assets across the team, sharing rate, reuse multiplier, top-reused shared assets, and a 30-day activity timeline. Per-member breakdowns are intentionally not provided — the panel gives admins adoption visibility without surfacing individual contributor behavior.

Adding members (admin only): The admin enters a new member's name, email, and a starter password. The admin then shares these credentials with the new member, who logs in and can change their password on the Account page. Seat limits apply: Team Starter supports 2-5 members total, Team Growth supports 6-10 (the admin counts as one seat).

Transferring admin ownership: Admins can transfer ownership to any current member using the Transfer admin action. After transfer, the previous admin becomes a regular member.

If the admin leaves the company without transferring ownership first, email contact@mydatawork.com and we can reassign admin access to another member.

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.

Workspace Agent — Proactive Observations

A teal “Analyze” button on the Suggestions tab runs the Workspace Agent. It checks six things across your workspace on demand and surfaces what’s worth your attention, grouped into three categories:

Cleanup (patient, not urgent):

- Use cases that have assets and progress but no stakeholder assigned
- Active use cases that haven’t been updated in 90+ days — worth reviewing whether they’re still active or can be archived

Activity (something changed):

- Recently-added assets (last 14 days) that aren’t linked to any use case yet — with a suggested best-fit use case based on keyword overlap
- Assets you removed within the last 30 days that are still referenced by an active use case or a lineage edge — broken dependencies you may not have realized followed from the removal

Insight (strategic observation):

- Active use cases with high projected value, low realized value (under 25% of estimate), and no updates in 60+ days
- Assets that have become “hidden infrastructure” — linked to three or more active use cases

Each suggestion is one-click navigable to the relevant asset or use case. You can dismiss with a reason, give thumbs-up/thumbs-down feedback, and the agent auto-resolves a suggestion when its condition no longer applies (for example, you assign the missing stakeholder, link the asset, or restore the removed file).

You’re charged 1 AI credit per suggestion surfaced — so a run that finds nothing costs nothing, and most runs cost only a few credits. The ceiling is 8 credits, reached only when all six checks find something at once; it’s always shown above the Analyze button before you click. Your first Analyze run is complimentary.

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 from cloud sources: two dbt models in your Snowflake warehouse refreshed, one Python notebook modified locally. File relevance filtering (Current 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.
- **Trust the value outlier checks.** If a use case value looks significantly different from your others, a gentle amber prompt will appear asking you to confirm. In the Portfolio tab, the value distribution note flags when mean and median diverge significantly — one use case may be pulling your total away from a realistic picture. These are informational only and never block you from using the app. They 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), Alteryx (.yxmd), ThoughtSpot (.tml), Dataiku DSS project exports (.zip), and Looker (.lkml). Cloud sources add GitHub repositories, dbt Cloud projects, and your data

warehouses (Snowflake, Databricks) — including the work products written into them by dbt, Sigma, Hex, Dataiku, DataRobot, Matillion, Alteryx, and other tools in the modern data stack.

How often does the Connector scan?

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

What if some files can't be reached during a scan?

When the Connector can't reach a file path during a scan — for example because a network share is disconnected, VPN dropped, or a file server is unavailable — the affected assets are flagged with an orange "Source unreachable" badge. Their metadata reflects the last successful scan. The badge clears automatically when the next scan succeeds. This way you always know whether your file metadata is current.

What are cloud sources?

Cloud sources connect GitHub, dbt Cloud, and your data warehouses (Snowflake, Databricks) directly using an API token — no installation required. Assets appear alongside local file assets in the Assets tab. Warehouse connections also catalog the outputs of tools that write into them — dbt models, Sigma views, Dataiku recipes, DataRobot predictions, Matillion pipelines — so your catalog reflects your whole stack, not just raw tables.

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 users get 5 AI credits per day. Team plan users get 20 per day. Credits reset daily and unused credits don't roll over. Additional credits can be purchased as needed (10 for \$5, 25 for \$10, or 50 for \$15).

What's the difference between canceling my subscription and deleting my account?

Canceling your subscription stops future charges and retains your data for 30 days so you can resubscribe anytime during that period. Deleting your account is immediate and permanent — your account and workspace are removed right away with no retention period. If you just want to stop paying, cancel your subscription. Delete your account only if you want to permanently remove yourself and your data.

Can I export my work?

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

What is the Asset Health Dashboard?

The Dashboard tab is the first tab in every workspace. It surfaces six panels of workspace health at a glance: use case staleness (under 30d / 30-60d / 60-90d / 90+d), portfolio totals (estimated vs realized with realization rate), stakeholder coverage, value distribution, tool distribution by asset.system, and Workspace Agent activity over the last 14 days. When demo data is loaded a small demo/real toggle appears in the upper-right; the toggle is dashboard-only and doesn't affect Assets, Use Cases, Suggestions, or the Assessment. If your workspace has neither real assets nor demo data, the dashboard shows a 'No real assets connected yet' empty state with shortcuts to Setup or to load demo data.

What is the Asset Estate Assessment?

An AI-powered review of your workspace, runnable on demand from Setup → Asset Estate Assessment. The first run is free on every plan — one free assessment per email, forever. You can re-run the assessment any time afterward; subsequent runs use AI credits like other AI features. It produces a 5-section report (Estate overview, Connections worth making explicit, External dependencies, Use case opportunities, Health observations) plus a Concrete next actions list, exportable to PDF. The assessment requires at least 2 active use cases (value, stakeholder, and staleness analyses all key off use cases). If you run with under 10 real assets you'll see a confirmation modal first. The assessment reads asset metadata and use case text only; file contents are never read. The 'one free per email forever' affordance is tracked via SHA-256 hash of your lowercased email.

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.

Connecting Snowflake or Databricks does more than catalog raw tables — it also surfaces the work products of every tool that writes into your warehouse: dbt models, Sigma views, Hex datasets, Dataiku outputs, DataRobot predictions, Matillion pipelines, and more. No tool-specific integration needed. If your team uses a modern data tool that writes to Snowflake or Databricks, MyDataWork sees its output automatically. For the full picture of what tools land in your warehouse and get cataloged, see the in-app help article “What gets cataloged through your cloud connections.”

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.