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.

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, who depends on it, and what to do next.

How this guide works

The guide has three parts, in the order most people actually learn:

- **Part 1 — Explore with the demo.** Load a realistic sample workspace and tour the product in three short walks. Nothing to install, nothing to connect.
- **Part 2 — Bring in your own work.** When you're ready: clear the demo, start from a plan with a Solution Pack, connect your files and cloud sources, and produce your first shareable result.
- **Part 3 — Going further.** Weekly habits, organizing as you grow, teams, connecting your own AI agent, and a quick tab reference.

Along the way you'll hit **CHECKPOINT** boxes — short “you should now be able to” lists. If a checkpoint doesn't match your experience, back up a section before moving on.

One thing to know before anything else

MyDataWork reads only **metadata** — the facts *about* your files, never what's inside them: names, paths, tool types, dates, sheet names, table and column references, and how assets connect. From metadata alone it can tell you which Excel models feed which dashboards and which SQL populates which reports — without reading a single byte of your file contents. **Your file contents stay private. Always.**

Part 1 — Explore with the Demo

Load the demo data

- On first login, the setup wizard offers three paths: **Use demo data**, **Connect local files**, or **Connect cloud sources**.
- Click **Use demo data**. Your workspace instantly fills with 19 assets, 7 tool families, and 6 active use cases — a realistic small analytics environment.
- That's it. No installation, no files to connect — you're ready to explore in seconds.

Demo data is fully reversible: remove it any time from Setup → Connect your data (“Remove demo data”) and reload it from the same spot. Removing the demo never affects real assets you've connected.

The demo isn't random files — it has stories deliberately built in: a stalled use case, a pair of near-duplicate queries, an orphaned model, and newly-arrived files nobody has categorized. The three walks below use those stories to show you what MyDataWork does. Meet the cast:

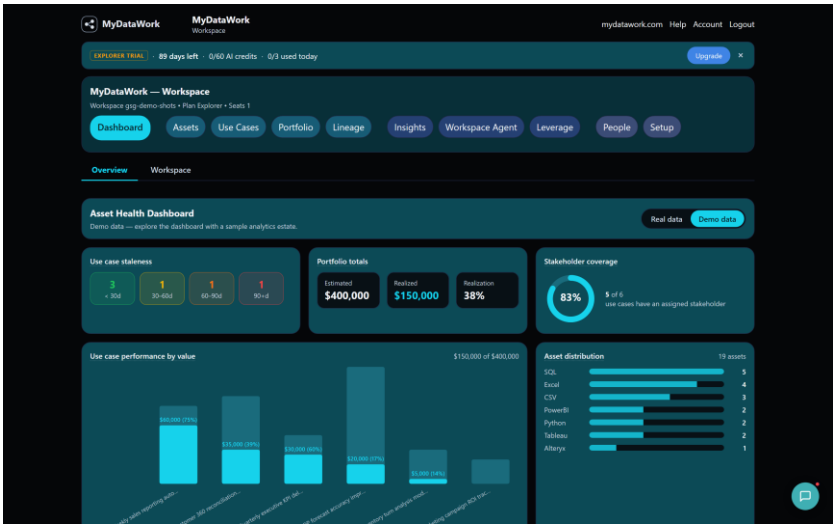
Asset	Tool	What it shows you
assumptions.xlsx	Excel	Core model assumptions feeding the forecast
forecast_inputs.csv	CSV	Raw data feeding the forecast model
forecast_notes.ipynb	Python	Analysis notebook on forecast results

Asset	Tool	What it shows you
model.sql	SQL	Queries powering the forecast model
kpi_exec_dashboard.pbix	Power BI	Executive KPI dashboard built on forecast outputs
recurring_report.sql	SQL	Builds the weekly sales report
sales_dashboard.twb	Tableau	Delivers the sales report to leadership
weekly_refresh.py	Python	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 — infrastructure worth coordinating before changing
customer_360_master.sql	SQL	Near-duplicate of the master query — the Assessment catches this consolidation candidate
account_health_pbi.pbix	Power BI	Account-health dashboard for the Customer 360 use case
kpi_data_load.sql	SQL	Refresh SQL feeding the Quarterly KPI use case
crm_extract.csv	CSV	Recently added, linked to nothing — the Workspace Agent flags it
nps_responses.csv	CSV	Another new, unlinked file — same Agent pattern
inventory_v2.xlsx	Excel	Inventory model with a large gap between estimated and realized value
inventory_dashboard.twb	Tableau	Dashboard for the inventory use case
campaign_roi.xlsx	Excel	Marketing ROI model — $0 realized of $25K estimated, the demo's most stalled use case
legacy_forecast.xlsx	Excel	Old forecast linked to no active use case — the orphan the Assessment reports

Walk 1 — See the work

The Dashboard

The **Dashboard** opens first every visit. With the demo loaded, six panels are populated: **Use case staleness** (how recently each use case was updated), **Portfolio totals** (estimated vs. realized value, with a realization rate), **Stakeholder coverage**, **Value distribution**, **Tool distribution**, and **Workspace Agent activity**. A small demo/real toggle in the upper-right flips between demo and your real data later — it affects the Dashboard only.



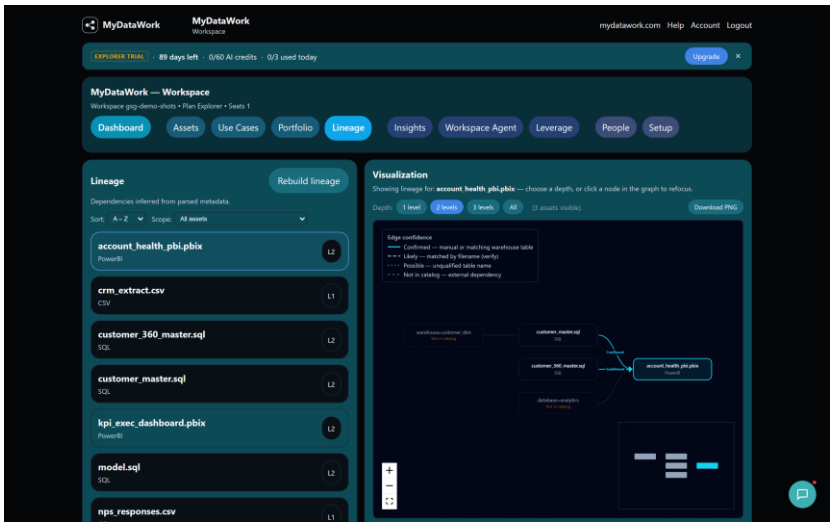
The Dashboard with demo data — six panels of workspace health at a glance.

The Assets tab

Open **Assets**. This is the live catalog: every file with its tool type, path, and topics, with filters by system and freshness. Click **assumptions.xlsx** — the detail panel shows what was extracted (structure only, never contents), which data sources it references, and **related assets by topic**.

Lineage — how it all connects

Open the **Lineage** tab. MyDataWork builds the dependency map automatically from structure — which files feed which dashboards, which SQL populates which reports — with every connection labeled by confidence: **Confirmed / Likely / Possible**. Trace the forecast chain: assumptions.xlsx → model.sql → kpi_exec_dashboard.pbix.



Lineage — the dependency map built automatically from structure, with confidence labels (Confirmed / Likely / Possible) and uncatalogued sources shown as ghost nodes.

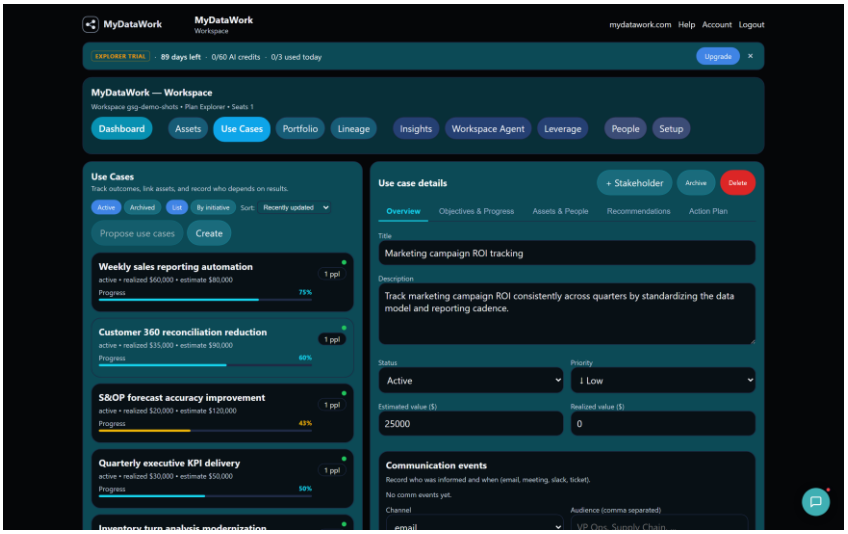
> **✓ CHECKPOINT — End of Walk 1**
>
> **You should now be able to:**
>
> – Load (and remove) demo data from Setup
> – Read the Dashboard's six panels and flip the demo/real toggle
> – Find any asset in the catalog and open its detail panel
> – Trace a dependency chain in Lineage and read the confidence labels

Walk 2 — See the value story

Assets tell you what exists. **Use cases** tell you why it matters — each one names a business outcome, the assets that serve it, the stakeholders who care, and the value at stake.

Open **Use Cases**. The demo has six. Click **Marketing campaign ROI tracking**: estimated value $25,000 — realized $0. That gap is the story: a use case someone believed in that has stalled. Now look at **stakeholders** — 5 of the 6 demo use cases have one assigned; coverage like this is how you know who to talk to before changing anything.

Open **Portfolio** next: the whole picture in one view — every active use case with its value, progress, and status, exportable to PowerPoint or PDF for people who don't have app access. You'll use this for real in Part 2.



A use case detail — Marketing campaign ROI tracking, showing the $0-of-$25K realization gap.

> **✓ CHECKPOINT — End of Walk 2**
>
> **You should now be able to:**
>
> – Explain what a use case is (outcome + assets + stakeholders + value)
> – Spot a stalled use case by its realization gap
> – See stakeholder coverage and why it matters
> – Open Portfolio and export a PowerPoint/PDF summary

Walk 3 — See what the AI finds

Turn AI on (and how credits work)

- Go to **Setup → AI Assist → Enable AI**. AI is off by default; a workspace admin enables it.
- AI actions use **daily credits, per user**: Explorer 3/day (60 total across the 90-day trial), Solo 5/day, Team 20/day per member. Every AI button shows its credit cost before you click, and failed calls are refunded automatically.
- Two things are free so you can try before spending: your **first Propose use cases run**, and the **Workspace Agent's first two attempts**.

Propose use cases

On the Use Cases tab, click **Propose use cases**. The AI reads your asset metadata and drafts use cases it thinks your files support — with objectives and value framing you edit rather than write from scratch. In the demo it will propose against the forecast and reporting chains. (First run free.)

The Workspace Agent — a worklist that builds itself

Open **Workspace Agent** and click **Analyze**. The Agent runs six rule-based checks — not AI guesses; deterministic rules, with AI used only to phrase what it finds — and lists discrete findings to act on. In the demo it flags **crm_extract.csv** and **nps_responses.csv**: new files linked to no use case. Each finding costs 1 credit to phrase, ceiling 8 per run; your first two attempts are free.

The Asset Estate Assessment — the full health report

From Setup → Asset Estate Assessment, run it: a point-in-time AI review of the whole workspace — health, gaps, risks, and ranked next actions in one shareable report. In the demo it catches the customer_master / customer_360_master near-duplicate (a consolidation candidate) and the orphaned legacy_forecast.xlsx. Your first Assessment is free (one per email address, ever); after that it costs credits, with a confirmation shown first. Agent = ongoing list of specific items; Assessment = periodic report.

Leverage — four ways to go further

The **Leverage** tab offers four AI analyses over the use cases and assets you select: **Find reuse opportunities** · **Identify automation candidates** · **Discover marketplace data** (external datasets that could enrich your work — unlocked when you set your cloud providers in Setup) · **Plan a migration** (modernization calls with effort and risk). There's also an in-app **Assistant** for questions about your own workspace.

> **✓ CHECKPOINT — End of Walk 3 — and of Part 1**
>
> **You should now be able to:**
>
> – Enable AI and read any action's credit cost before clicking
> – Run Propose use cases (first run free) and edit what it drafts
> – Run the Workspace Agent and act on a finding (first two attempts free)
> – Run the Assessment (first one free) and read its ranked next actions
> – Name the four Leverage modes and when you'd use each

Part 2 — When You're Ready: Bring In Your Own Work

You've seen how MyDataWork works on a workspace with structure already in it. Yours will start empty — and the hard part of starting isn't connecting files, it's deciding what to track and how to organize it. You don't have to invent that from scratch.

Step 1 — Remove the demo data

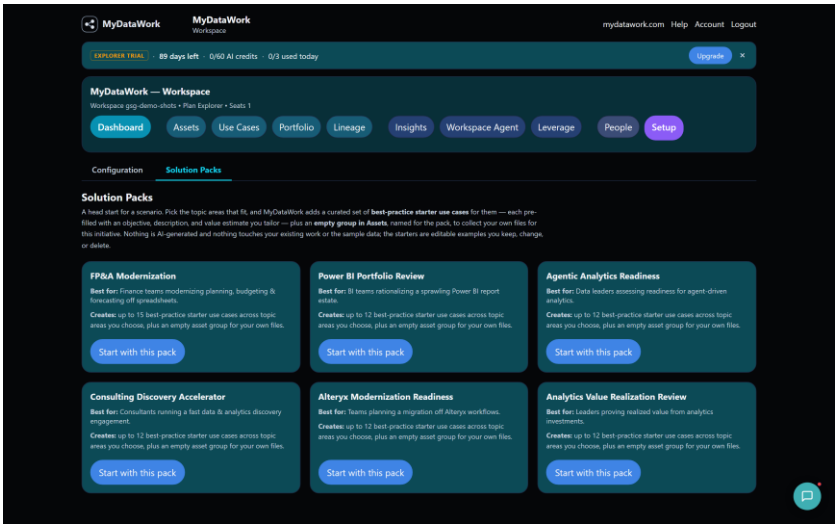
- Go to the **Setup** tab.
- Click **Remove demo data**.
- Your workspace is clean. (You can reload the demo any time — removal never touches real assets.)

Step 2 — Start from a plan: activate a Solution Pack

Open **Setup → Solution Packs** and pick the pack closest to your work:

Solution Pack	Built for
FP&A Modernization	Finance planning, budgeting, close, and data governance
Power BI Portfolio Review	Rationalizing a sprawling BI estate
Agentic Analytics Readiness	Preparing your workspace for AI agents
Consulting Discovery Accelerator	Per-client discovery — built for consultants
Alteryx Modernization Readiness	Planning a migration off legacy workflows
Analytics Value Realization Review	Proving the value you've already delivered

- Inside the pack, choose the **topic areas** that match your world. Nothing is pre-selected — you're tailoring, not accepting a dump.
- MyDataWork creates **starter use cases** for exactly those areas — each pre-filled with an editable objective, description, and an illustrative value estimate — grouped under an **Initiative** named for the pack, with an empty asset group ready for your files.
- Tailor freely: keep what fits, delete what doesn't, rewrite anything. These are examples to shape, not homework to accept.



Solution Packs — pick a scenario from the gallery of six packs, then choose the topic areas that fit inside the pack.

> **Good to know:** Solution Packs are free on every plan, use no AI credits, and re-running a pack never duplicates what you already have — explore without making a mess. Prefer a truly blank page? Skip this step; everything below works the same.

Step 3 — Connect your work

Option A — Local files (Windows Connector)

- Click **Connect folders** from the Assets tab or Setup, and install the MyDataWork Connector — a small background program, code-signed by MyDataWork, LLC, so it installs without an "unknown publisher" warning.
- Enter your setup code and choose the folders where your work lives. Your files appear in Assets within a minute, imported privately into your account.
- Only metadata ever leaves your machine — contents are parsed locally and stay on your PC. Cloud-synced folders (OneDrive, Google Drive, Dropbox) are fully supported. Add folders any time; click **Rescan now** in Setup to pick up changes immediately.

Option B — Cloud sources (12 available)

Go to **Setup → Cloud Sources** and connect with a read-only token — no installation required:

Snowflake · BigQuery · Redshift · Databricks · GitHub · dbt Cloud · Power BI · Tableau · Sigma · Looker · ThoughtSpot · Dataiku

Connecting a warehouse does more than catalog tables — it also surfaces the work products of every tool that writes into it (dbt models, Sigma views, Hex datasets, Dataiku outputs, and more), no tool-specific integration needed. Every cloud connector is read-only and keeps structural metadata only; fetched content is parsed in the moment and discarded.

Option C — Cloud providers (one minute, unlocks a Leverage mode)

In **Setup → Cloud Providers**, check the platforms your organization uses. This unlocks **Discover marketplace data** in Leverage — AI recommendations for external datasets that could enrich your work.

Step 4 — Link your work to your plan

This is the step that turns a list of files into something useful. Open a starter use case from your pack and **link the assets that serve it** — the forecast workbook to the forecasting starter, the close SQL to the close starter. As you

link, the Initiative starts tracking against real work: lineage builds, the Dashboard populates, and the value estimates you tailored become numbers you can defend.

On the use case's Assets & People tab, click Link assets (or the Edit button on the Linked assets card) to open a checklist of your assets — tick the ones that serve this use case and click Done. Changes save as you go, and you can add stakeholders the same way.

> **Don't aim for completeness on day one.** Link the three or four assets you touch most; the rest can follow as you work.

Step 5 — Your first shareable result

A week in, someone will ask what you're working on. Here's the move: open **Portfolio**, filter to your Initiative, and **export**. The PowerPoint or PDF covers exactly that program — your use cases, their status, their value story — nothing unrelated bleeding in, no manual trimming.

> **✓ CHECKPOINT — End of Part 2**
>
> **You should now be able to:**
> - Clear the demo and start your own workspace from a Solution Pack
> - Connect a local folder with the Windows Connector, and a cloud source with a read-only token
> - Link real assets to your starter use cases
> - Filter Portfolio to your Initiative and export a clean, program-specific deck

Part 3 — Going Further

Habits for your first weeks

- **Run the Agent when you sit down to plan.** Click Analyze on the Workspace Agent once or twice a week — it's a worklist that builds itself: unlinked new files, missing stakeholders, stale use cases, value gaps.
- **Update value as things land.** When a use case delivers, record realized value — the Dashboard's realization rate is only as honest as what you log.
- **Watch staleness.** The Dashboard's staleness panel is your early-warning system for work drifting off the radar.
- **Spend credits deliberately.** Daily credits are per user and reset each day (they don't roll over). If you need more: purchased credits (10/$5, 25/$10, 50/$15) go into a shared workspace pool any member draws from once their daily allowance is used; only a workspace admin can purchase. Purchased credits never expire.

Organizing as you grow: Groups and Initiatives

	Asset groups	Initiatives
What they organize	Assets (files, queries, dashboards)	Use cases (projects and programs)
Membership	An asset can be in several groups	A use case belongs to one initiative — so value roll-ups never double-count
Typical use	One group per client, project, or domain	One initiative per program — e.g., a Solution Pack's starters
What they unlock	Scope any AI analysis to the group	Filter Dashboard, Portfolio, and Insights; scope any AI analysis to the initiative

Every AI analysis — Propose, the Leverage modes, the Workspace Agent, the Assessment — can be scoped to a group **or** an initiative, and scoping never changes the credit cost. Both are personal to you: your organizing scheme is yours, not imposed on the team.

Working with a team

On Team plans, each member has their own private space — assets, use cases, initiatives, lineage, and insights are **private by default, including the admin's own work**. Sharing is deliberate: click **Share to Team** on an asset to publish it to the team's Shared tab; colleagues can **Copy to mine** for an independent copy. Only assets are shareable — your use cases and initiatives stay yours. Admins add members directly (name, email, starter password — no self-join), can transfer ownership, and have an opt-in **Workspace view** for onboarding, audit, and oversight — its use is logged. Each member gets their own daily AI credits (20/day on Team plans).

Connect your own AI agent (Agent Access / MCP)

If you use an AI agent — Claude, a custom agent, an agent framework — you can give it governed access to your workspace context over the open **Model Context Protocol (MCP)**. Two modes: **Live** (on-demand reads over a bearer key; paid plans; daily read cap) and **Export** (download a point-in-time context file to hand your agent; all plans, and the route for OAuth-based clients like Claude Desktop). Keys are per-use-case, revocable, and audited. The same boundary applies as everywhere else: metadata only — never file contents, and never stakeholder names. Agent access uses its own quota, not your AI credits.

Everyday limits worth knowing

- Lineage rebuilds: 5/day · Exports: 10/day · Jira integration: 20 calls/hour. Normal work rarely touches these — they prevent accidental runaway usage.
- Plans at a glance: Explorer (free, 90 days) — 1 seat, 30 assets, 1 cloud source; Solo — 300 assets, 2 Windows Connectors; Team — 2–10 seats, 2,000 assets. Larger organization? Negotiated Enterprise plans exist — contact contact@mydatawork.com.
- Mobile: the web app works on phones for browsing, checking the Dashboard, and reviewing use cases; connecting folders requires the Windows Connector on a PC.

Quick reference — the tabs

Tab	What it's for	Start here when…
Dashboard	At-a-glance health: staleness, value, coverage, tools, Agent activity	You want the state of everything in ten seconds
Assets	The live catalog with filters, groups, and detail panels	You're looking for a file or its context
Use Cases	Outcomes: objectives, linked assets, stakeholders, value; the By-initiative view	You're defining or updating why work matters
Portfolio	The shareable picture; PowerPoint/PDF export; initiative filter	Someone asked for a status you can send
Lineage	The dependency map with confidence labels	You need to know what feeds what before changing it
Insights	Patterns across the catalog; initiative filter	You want trends, not items
Workspace Agent	Rule-based findings; a worklist that builds itself	You're planning what to tackle next
Leverage	Four AI analyses: reuse, automation, marketplace data, migration	You're deciding where to invest effort
Setup	Connections, Solution Packs, AI Assist, cloud providers, data portability	You're configuring anything

✓ CHECKPOINT — You've finished the guide

You should now be able to:

- Explore any workspace — demo or real — and read its health at a glance
- Start a new workspace from a Solution Pack and tailor it to your work
- Connect local folders and cloud sources, and link assets to use cases
- Produce a stakeholder-ready export scoped to one initiative
- Use the AI deliberately: Propose, Agent, Assessment, and Leverage — with credits under control
- Grow into teams and agent access when you're ready

MyDataWork — Know your data. Be ready for anything.