

# User Engagement Strategies

*Increase your Data Cookbook Usage*

Workshop Wednesday #11

November 12 2019

# Logistics

- 1<sup>st</sup> half of session is presentation and will be recorded
- 2<sup>nd</sup> half of session is discussion and will not be recorded
- You will receive the link to the recording tomorrow
- If question or comment put in the chat / question box

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# Welcome

Say Hello in Chat – institution, number of people, what you want to learn about

Workshop Wednesdays on the horizon - 2PM EST

December 4 Quality Rule Workflows

January 29 Specifications Five Ways

February 26 How to Import Content in Bulk

Register for Users Group Meeting November 20 @ 2 PM EST

<https://attendee.gotowebinar.com/register/1914869169220581387>

# Agenda

- Caveats
- Who is your user?
- Communication Plan
- Training Plan
- Goals, Measure Progress, Two Scenarios
- Why is this so hard?

# Caveats

- Not feature focused
- Ideas – you provide the action!
- Road map – don't do everything NOW

# Who is your user?

Report consumer or requester (hundreds)

Connie Sumer

Data Cookbook content provider (~20-50)

Registrar

Bursar

IR Manager

Report Managers

# Consumers – More Communication, Less Training

- Recipients of budget reports
- Department chair
- Provost
- Student advisors
- Coaches

**Communication**

**Training**





# Communication – Data Consumer

- Method
  - Opt-In email list
  - Recorded video
  - Webpage
  - Data Cookbook APIs
  - Someone else's newsletter
  - Their department meeting
- Content
  - Stats
  - Description, definition, explanation
  - Use Cases

**Communication**

**Training**



# API Examples

Embed glossary search in webpage (University of Rochester and others)

<http://www.rochester.edu/adminfinance/urfinancials/>

**GLOSSARY SEARCH**  
Powered by Data Cookbook

fund

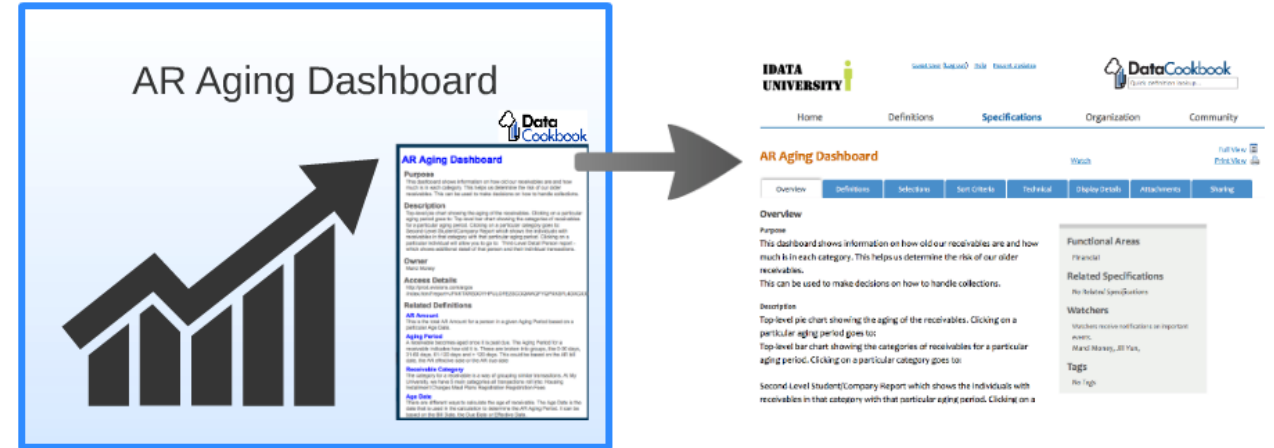
☐ Exact match?

Search

**SEARCH RESULTS**

**Endowment funds**  
Funds whose principal is non-expendable (true endowment) and that are intended to be invested to provide earnings for institutional or their specified use.

**fund (Workday)**  
A worktag that is attached to all Financial Activity Object (FAO)s in Workday. The Fund identifies the source of funding or financial support. The Fund worktag is a related worktag as it is required for every oper-



Links or buttons within reporting tool; Cognos, Tableau, Argos, etc

# Training – Data Consumer

- Replace ticket systems with Data Cookbook workflows
  - Information Request - demo
  - Report Request or other “Thing” Request – demo; permissions All Users group
- Integrate with ticket systems – shell ticket systems
- Record a 5 minute video overview
- Make it obvious who to contact
- Make it self-evident – no instruction needed



# Content Providers — Less Communication, More Training

- Data steward
- Report writer
- Database manager

**Training**

**Communication**



# Communication – Content Providers

- Method
  - Mandatory email list
  - Webpage
  - Newsletter
  - Town Hall meetings
- Content
  - Content stats – amount; speed
  - Usage stats
  - New content updates
  - New features
  - List of problems
  - Success stories

**Training**

**Communication**



# Training – Content Providers

- Monthly or biweekly status face to face meetings
- Orientation packet and process for new role holders
- Role job descriptions including time allocation
- Evaluate work against content standards

**Training**

**Communication**



# Set Goals and Measure Progress

- Increase usage by 10% in 6 months
- Increase content – monthly quota
- Increase speed of Approval

# Set Goals and Measure

## Goals

Increase usage by 10%

Increase content – quota

Increase speed within workflow

## Measure

Manual

ODBC Connector



# Data Cookbook ODBC Connectors

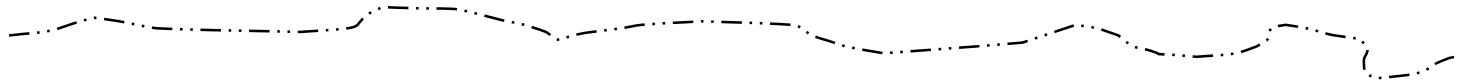
## Settings

### Application Settings ⓘ

---

Welcome Message: ⓘ

Information Request Help: ⓘ



### Database Access

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ODBC Access: ⓘ      Off

Please ask an administrator if you require ODBC access

Please click [here](#) for descriptions of all available database views:









<https://community.datacookbook.com/institutions/idata#tab-specifications>

Shared Specifications

View this organizations' specifications for reports and other reporting components.

List of ODBC Views

Displaying all 15 specifications

Name	Purpose	Affiliation
<a href="#">API Usage View</a> 	<p>This view can be used to assess how often the APIs are being invoked in a period of time, or by a specific IP address or user.</p> <p>This can also be used to help see which specifications, definitions or search strings are most common.</p>	<p>COMMUNITIES:</p> <p> <a href="#">Public</a></p> <p>ORGANIZATION:</p> <ul style="list-style-type: none"><li><a href="#">IData Incorporated</a></li></ul> <p>FUNCTIONAL AREA(S):</p> <ul style="list-style-type: none"><li><a href="#">Data Cookbook</a></li></ul>
<a href="#">Activity Summary View</a> 	<p>This view allows you to see when activity is occurring in your Data Cookbook account. It also can help determine which IP addresses and users are accessing your content.</p> <p>If you need to look for specific types of activity, like viewing definitions or API requests, there are separate views</p>	<p>COMMUNITIES:</p> <p> <a href="#">Public</a></p> <p>ORGANIZATION:</p> <ul style="list-style-type: none"><li><a href="#">IData Incorporated</a></li></ul> <p>FUNCTIONAL AREA(S):</p> <ul style="list-style-type: none"><li><a href="#">Data Cookbook</a></li></ul>
<a href="#">All Tags View</a> 	<p>To show a list of all tags used by an institution, as well as the objects that are tagged. This can be used to see which tags are commonly used and by which objects (definitions or specifications).</p> <p>From this view, you could also pull information like functional</p>	<p>COMMUNITIES:</p> <p> <a href="#">Public</a></p> <p>ORGANIZATION:</p> <ul style="list-style-type: none"><li><a href="#">IData Incorporated</a></li></ul> <p>FUNCTIONAL AREA(S):</p> <ul style="list-style-type: none"><li><a href="#">Data Cookbook</a></li></ul>
<a href="#">Content Usage View</a> 	<p>This view can help assess the usage of the content within your Data Cookbook account. You can determine which specifications and which definitions are getting the most usage (views).</p>	<p>COMMUNITIES:</p> <p> <a href="#">Public</a></p> <p>ORGANIZATION:</p> <ul style="list-style-type: none"><li><a href="#">IData Incorporated</a></li></ul> <p>FUNCTIONAL AREA(S):</p> <ul style="list-style-type: none"><li><a href="#">Data Cookbook</a></li></ul>

# Scenario 1 *Increase Consumer login 10%*

## Timeline and Tasks

- 6 months
- Track current user login
- Increase #API report links from 10 to 50
- Snag an invite to routine meetings of 3 business units and introduce data governance

## Collateral

- User login stats via ODBC
- Embed API links in 50 reports
- Script "sales" presentation
- 3 Benefits for consumers
- Webpage

# Embed API links

## Example with a Cognos Report

**PSU Monthly Activity Report by FOAPAL**  
[Report & Data Definitions](#)

**Revenue Accounts:**  
☒ Including Revenue  
☐ Not Including Revenue

**Select a Fiscal YR:**  
☐ 2015  
☐ 2014  
☐ 2013  
☐ 2012  
☐ 2011  
☐ 2010

**Select Fund:**  
VALUE

**Select Org:**  
VALUE

**Select Program:**  
VALUE

**Select Activity:**  
VALUE

**Select Location:**  
VALUE

## Scenario 2 *Add 200 definitions*

### Timeline and Tasks

- 3 months
- Target HR and Facilities
- Identify stewards
- Train stewards
- Add new stewards to meeting invites and email lists

### Collateral

- Orientation program for new steward
- Steward role description
- Standards documented

# Steward Orientation Program

## 3 Sessions

1. Review Role and Purpose
2. Train in use of Data Cookbook and creating content
3. Critique content

# Steward Role Description

## **Data Steward Duties**

A steward leads the definition of business terms. A steward is primarily concerned with language and the meaning of data. Stewards are experts in their data area and use the data in their domain on a daily basis. Each data domain, sub-domain, or term has a steward.

### **Duties of a Steward**

1. Creates a clear and unambiguous definition of a term.
2. Specifies the values that the term may take and the meaning of those values.
3. Defines appropriate usage of the term.
4. Defines data entry quality standards for recording of values of the term.
5. Ensures consistent usage. The term has the same meaning where ever it is used.
6. Identifies similar terms and documents how they differ from the term being identified.
7. Oversees cleanup of errors in data that correspond to the term.
8. Identifies unused terms and manages their deprecation.
9. May delegate authority to others.

# Document Standards

## Content Standards | Knowledge Accounts

### Definitions

#### Naming Conventions

- **Be descriptive**
  - "Academic Department" instead of "Department"
- **Use Title Case**
  - "Accounts Receivable" instead of "accounts receivable"
- **Use complete words**
  - "Average GPA" instead of "Avg GPA"
- **Avoid numbers and special symbols**
  - "Returning Student Percentage" instead of "% Returning Students"
- **Do not use underscores in multi-word names**
  - "Student Graduation Date" instead of "Student\_Graduation\_Date"
- **Combine elements into 1 definition**
  - "Address" instead of "Street line 1"; "Street line 2"; "Zip Code"
  - "Student Name" instead of "Student First Name"; "Student Last Name"
  - "Admissions Status" instead of "admit status code" and "admit status code description"

#### Functional Definition

- **Identify a category or describe a process**
- **Include values (optional)**
  - If fewer than 10 values, list them in functional definition.
  - If more than 10 values, choose one
    - Point to a values list via a URL
    - Identify the office that can supply a values list
- **Be candid, not sensational**
- **Use business language, not technical language**
- **Optional:**
  - Make wiki linkages to other definitions
  - Include business rules

DEFINITION

## academic advising

Review

Version 1

1

### Functional Definition: ⓘ

A process that assists student goals.

#### Functional Definition

The functional definition describes what a term means and how it is used at your organization.

This description might include information about the valid data values, when the term is likely to be used, how the data is acquired, how long it is maintained, or rules about presentation.

### Other Information:

SOURCE OF DEFINITION: ⓘ None specified

CLASSIFICATION: ⓘ

FUNCT

Enrollment

WORK

Definition A

MODE

Data Stewa

SYNON

## Russell Group

Drafting

Version 1

1

Edit

Describes unique characteristic

Category

### Functional Definition: ⓘ

An association of 24 research-intensive universities established in 1994 to represent its members interests to government and parliament. The group provides strategy, policy development, intelligence, communications and advocacy for its member institutions.

Purpose

The Russell Group is regularly used to compare UoN with institutions in the sector due to their similar research-intensive focus and composition. In reports featuring multiple institutions it will often appear as a filter or can used to generate averages and benchmarks for the group.

How it's used

The list of current members can be found on the [Russell Group Website](#).

Accepted values

Credit: Nottingham



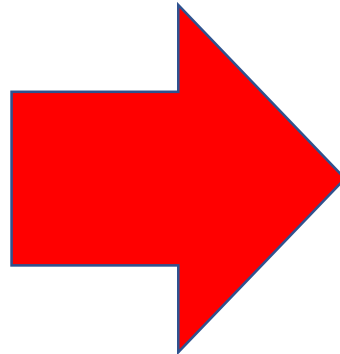
# Why is this so hard?



Operations stay same: enroll, grades, degree



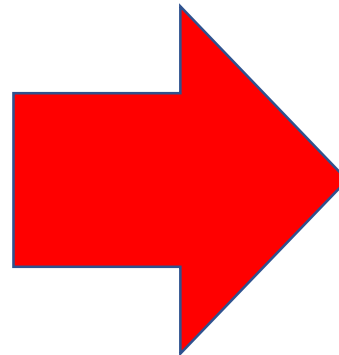
Choose class on whim,  
no connection between  
classes; nothing to earn



Structure, rules, process; earn something

# Why is this so hard?

- Brand new work; not old work repackaged
- Cross-department; cross-institution
- Inexperience, thus tentativeness



# Summary

- Identify who you want to engage
- Set goals
- Measure progress
- Repeat Repeat Repeat

# Reminder – Workshops coming up

## December 4 Quality Rule Workflows

*Who should play a role in the process? What are the task? We will take a look at several Quality Rule Approval workflows in Data Cookbook to learn how the workflow can support your rule governance. Quality is an Enterprise feature; Knowledge clients can reproduce some features manually*

## January 29 2020 Specifications 5 Ways

*Reports and other data deliverables vary in format, purpose, and perceived value. For example, an ad hoc exploratory report might be used by two people, standard operational reports might be consumed by hundreds of casual data users, or a comprehensive dashboard might support the daily work of a core group of staff. In this session, learn how to customize Specifications so that the level of effort you put into a specification matches the use case and audience for that data deliverable. This session uses the Enterprise license level.*

## February 26 2020 How to Import Definitions

*The Import Definition feature can save time when you want to add or update a large number of definitions. This session reviews the import process, user permissions, and use cases that expedite the process of adding or updating definitions.*

# Recorded Data Governance Webinars

<http://www.datacookbook.com/DG>



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#### Pragmatic Data Governance Series

#1 Just in Time Data Governance (6/22/17)

[To View](#)

#2 Data Governance on a Dime (6/8/17)

[To View](#)

#3 Clear Path from Question to Answer (3/16/17)

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Quick Summary of What  
> is Data Governance and  
Key Best Practices

Higher Education Data  
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Webinars for November

Webinar Schedule for  
> Data Governance Series  
Announced

Upcoming webinars at: <http://www.idatainc.com/about-us/idata-webinars/>

# Data Governance Resources Page

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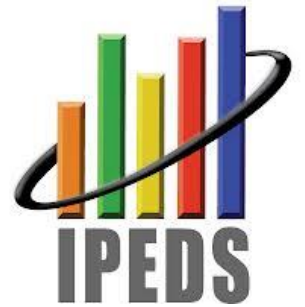
- Open to everyone
- Content from regulatory agencies and other institutions.
- Data definitions, Specifications, Contact information, Documentation



**Common Data Set Initiative**

*A collaborative effort between publishers  
and the educational community*

**NSLDS**



Watch for your community forum news emails

# Get Help and Thank you!

- Pop Up Help within Data Cookbook (triangle in lower right corner)
- Ask clients – Post to *Questions and Support* in the Forum
- Ask IData Staff – [support@datacookbook.com](mailto:support@datacookbook.com)
- Visit <http://support.datacookbook.com>
- Visit **Help** link within Data Cookbook
  - Administrators Guide (check for updates)
  - User Guide (ditto)



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