

Data Request Process

3 Ways with Specifications

#5 Workflow Wednesday Series

The Cookbook offers several ways to streamline your report request process. Learn about the Find Information workflow, get tips on utilizing your existing ticket system, and learn how to embed the link to start the request within your data information website.

Logistics

- 1st half of session is presentation and will be recorded
- 2nd 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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Agenda – The Data Request Process

- Describe the Problem
- Solve the Problem in 3 ways
 - Experienced DCB user
 - Casual DCB user
 - Proxy DCB user
- Demo 3 ways
- Compare 3 ways

The problem...



- Request process is unclear
- Request process is nepotism
- Hard to re-use report formulas because can't find old formula fast enough to fulfill request

Demo – based on Requester Type

Experienced DCB User – *Create a Specification*

- List of STEM students

 - Major

 - Active student

 - Full time

 - GPA in STEM

Casual DCB User - *Find Information*

- Find Information –

- Submit Information Request

Proxy DCB user - *External ticket system*

- Proxy use of Create a Specification

Compare Paths

User Type	Path	Permissions	Workflow	Training burden <i>Requester</i>	Training burden <i>Report Writer</i>
Experienced	Create Spec	Editor for Spec	Specification	High	Medium
Casual	Find Info	Viewer	Specification and Find Information	Medium	High
Proxy	Create spec	No account	Specification	None	High

More ideas

- Mix and match paths
 - By data domain
 - Enrollment data requests use Find Data
 - By data system
 - Data Warehouse report requests use Create a Specification
 - By service unit
 - Requests to IT continue to use IT Ticket System and Proxy
- Use a Road Map
- Streamline and simplify, not add complexity
- If it's not broken, don't fix it
- Monitor usage; drop processes that are not used

Q&A

- Workshop Wednesdays return in September

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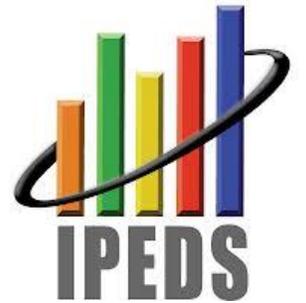
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Thank you!



Extra slides