Design a Data Cookbook Training Program

Extend the value and benefit of using Data Cookbook by offering a training program. This session provides a review of the training materials IData offers through the Data Cookbook. Learn tips for planning and implementing a training program using a combination of IData training materials and materials created at your organization. Topics include prioritizing Data Cookbook features, planning for all user levels, adult learning principles, and designing effective scenarios using your Data Cookbook content.
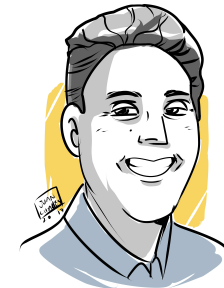
Workshop Wednesday #20

October 2021

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

![idata logo]

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Workshop Wednesday Agenda

1. Adult Learning 101
2. Scope: Task vs Marketing vs Content
3. Content modules
4. Sample training agendas using modules and roles
    1. New Data Steward
    2. Data Steward Refresher
    3. Data System Custodian
    4. Data Governance Group Orientation
5. Random Tips

Adult Learning 101 *Real Life | Role based | Multi format*

1. Audience/ role – position specific

   Data Steward | Data Consumer | Report Writer | Data Quality Manager

2. Task specific

3. Learning outcomes

4. Offer a variety of delivery formats
   - face to face | recorded | hybrid
   - print documentation – overview and job aid
   - on demand | custom

5. The learner controls the learning

Adult Learning 101 - Interactive

- Gamify it
- Certificate program
- Peer to peer
- Workshops

Task vs Marketing

Task
- Create a definition
- Add technical definitions
- Add 15 data systems
- Import 3 schemas
- Auto approve 37 definitions
- Add technical metadata to run quality rules
- Fix all quality issues within 2 days

Marketing
- Illustrate how to use Data Cookbook
- Use cases galore
- Mimic each role and stage in workflow
- Persuasive
- Emphasize value
- Candid resource allocation
- Balance of value and resources

Task vs Content

Task

- Create a definition
- Add technical definitions
- Add a data system
- Import a schema
- Auto approve definitions
- Add technical metadata to run quality rules
- Fix a quality issue

Content

- 50 definitions in 90 days
- 200 historical Argos reports
- 5 quality rules per month indefinitely
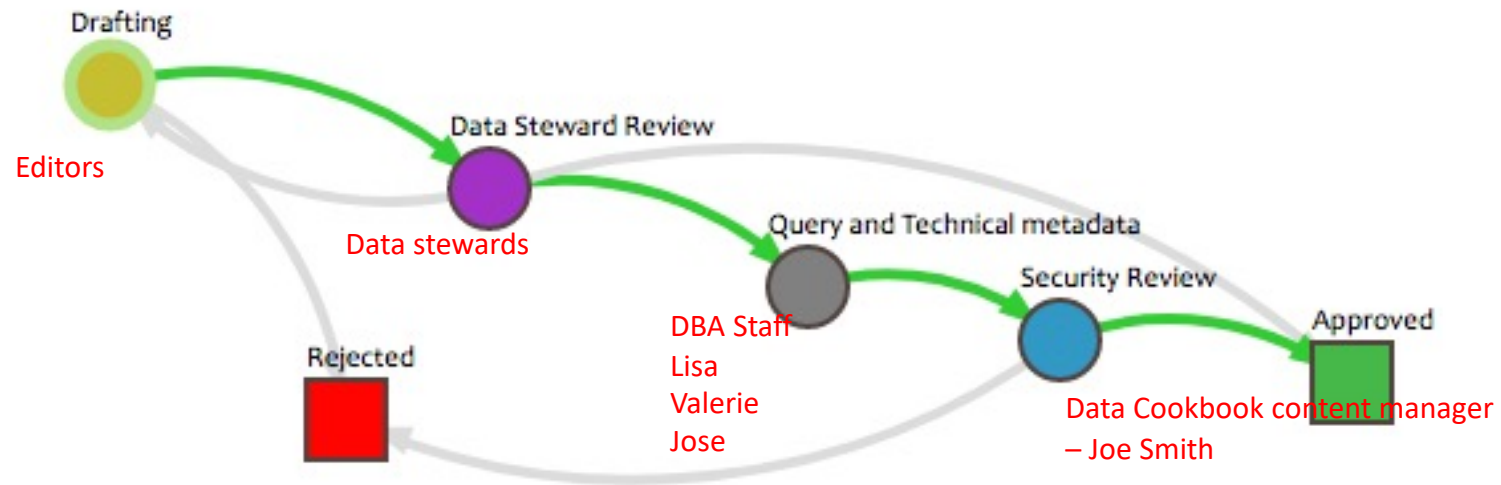- All definitions from top 10 most popular canned reports; plus each report

Content Modules

1. Workflow

2. Object type

3. Data system

4. Workshop

Content Module - Workflow

- Overview visual
- Main task each stage
- Main roles and people each stage
- Courtesy tasks and roles
- Email alerts
- Home and Task areas
- Queues

Quality Rule workflow

Content Module – Object type

Participant role – participates in workflow

- Overview most fields
- Detail on purpose and correct usage on key fields for this role
- Create 1 together
- Bulk import
- Homework assigned
- Usually offered in tandem with a Workshop
- 60 or 90 minutes

Definitions

Name

Functional Definition

Definition Source

Technical Definition(s)
    Data System
    Time Context
    Technical Definition

DEFINITION
Admitted Student

[Drafting] Version 1 ⚠¹

💬 Comment (0 comments)
⭐ On my watch list

Show workflow

Functional Definition: ⓘ

An applicant who has been granted an offer to enroll at the University. The applicant may accept or decline an offer.

Other Information:

SOURCE OF DEFINITION: ⓘ None specified

CLASSIFICATION: ⓘ

Quality Attributes ⓘ No quality attributes defined

Technical Definitions ⓘ

Data System: 1. Enterprise Systems » Ellucian Banner ERP System
Time Context: As of Current Date/Time
Technical Definition:

```
Undergraduate Day Students:
select SARADAP_PIDM
from SARADAP,SARAPPD
where SARADAP_TERM_CODE_ENTRY = '201710'
and SARADAP_LEVL_CODE = 'U'
and SARAPPD_APDC_CODE in
('AR','AD','AA','AC','PD','A9','A6','A4','ZZ','ZC','ZA')
and SARADAP_PIDM = SARAPPD_PIDM
and SARADAP_TERM_CODE_ENTRY = SARAPPD_TERM_CODE_ENTRY
```

🏛 FUNCTIONAL AREAS ⓘ
Admissions

●→ WORKFLOW ⓘ
Definition Approval

🔏* MODERATORS ⓘ
Data Stewards - Admissions

📖 SYNONYMS ⓘ
No Synonyms

🏷 TAGS ⓘ
No Tags

📎 ATTACHMENTS ⓘ

📄 RELATED SPECIFICATIONS (0) ⓘ

📖 RELATED DEFINITIONS (0) ⓘ
No Related Definitions

⚙ RELATED QUALITY RULES (0) ⓘ
No Related Quality Rules

❀ QUALITY ISSUES (0) ⓘ
No Quality Issues

👥 COMMUNITY SHARING (0) ⓘ

Quality Rules

- Name
- Description
- Rule Severity
- Rule Type

Content Module – Data System

- Overview all fields and correct usage – Data Cookbook
- Overview IDataHub integration - maybe
- Data system visual – system vs specification
- Illustrate how schema objects are used
- Schema change management

What to inventory?
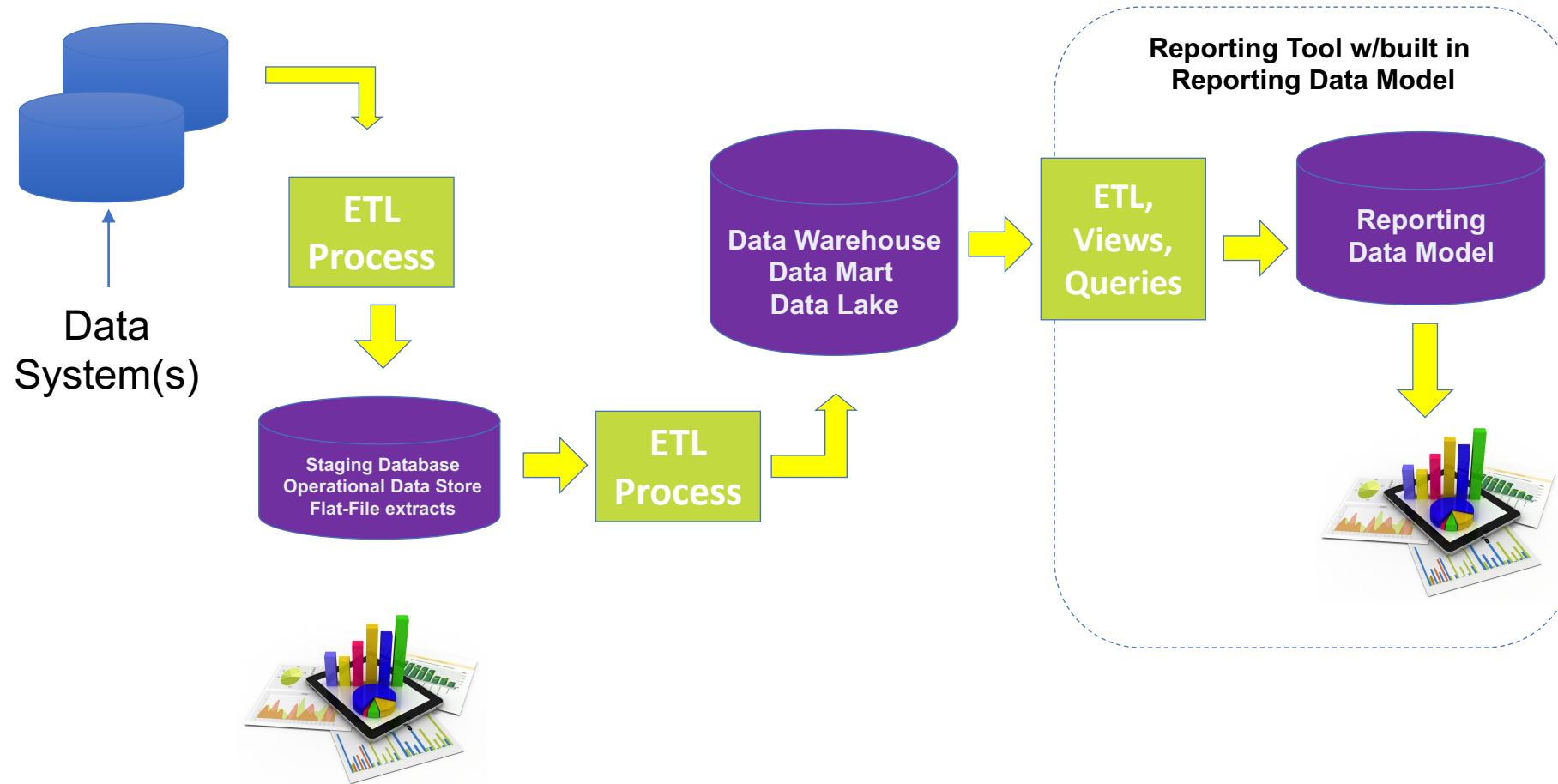
Schema – 2 views

DATA MODEL: RDBMS
Ellucian Banner ERP System

Data Model : SATURN : All Columns
schema version uploaded on: 10/01/2021 10:56 AM

Column : STVADMT_CODE

Column properties

Name	Value
Parent:	STVADMT
Name:	STVADMT_CODE
Type:	VARCHAR2(2)
Length:	2
PK/FK:	Primary Key
Precision:	
Scale:	
Nulls allowed:	No
Comment	This field identifies the admission type code referenced in the Admissions Module.
Note	

Technical Definitions ⓘ

Data System: 🟣 1. Enterprise Systems » Ellucian Banner ERP System
Time Context: None specified
Technical Definition:

STVADMT_CODE and STVADMT_DESC
from validation table STVADMT

STVADMT_CODE ── ┐
                ├─ ⟨⟩Concaten... ──
STVADMT_DESC ── ┘

Ellucian Banner ERP System

Data System: 🔵 2. Primary Systems » My CRM
Time Context: None specified
Technical Definition:

Admission_Date__c

Content Module - Workshop

- Let participants guide the details
- Assumes they have experimented with content
- Balance task skills with content decisions
- Consider workflow now or as separate module

Template: Training Program for Data Stewards

Session 1 – User profile; overview; org goals

Session 2 – Content module - Definitions

Session 3 – Content module - Quality Rules

Session 4 – Workshop, Tips, Best Practice

Template: Training Program for Report Writers

Session 1 – User profile; overview; org goals

Session 2 – Content module – Specification Customization

Session 3 – Content module - Specifications

Session 4 – Workshop, Tips, Best Practice

Template: Training Program for Data Quality Managers

Session 1 – User profile; overview; org goals

Session 2 – Content module – Quality Rules

Session 3 – Technical metadata to execute rules; force a broken threshold

Session 4 – Workshop, Tips, Best Practice

Template: Training Program for Data Quality Managers

Session 1 – User profile; overview; org goals

Session 2 – Content module – Reference Data

Session 3 – Technical metadata to populate reference data; force a valid value change

Session 4 – Workshop, Tips, Best Practice

Template: Program for Orientation

1 session – 90 minutes

- What is Data Cookbook?
  - Approval workflow demonstration
- Why did we buy it?
- What is our plan to add content?
- What happens next?

IData provided materials

Just In Time videos

Office Hours

Edit Help Texts for job aids

Admin and User Guides

Tips

- Know and satisfy the goals of the person who commissioned the training
- Be prepared to answer or coach on administrative decisions
  - How much? From where? By when? Who decides?
- Think Training PROGRAM not Training Session
- Instructional design and training delivery are day jobs
  - Seek training yourself | Use campus resources | Hire for the skill
- Seek participant evaluation
- Separate the How from the Why
- Separate the How from the How well

Summary

- Set purpose and allocate time
- Follow adult learning guidelines
- Chunk content for modular re-use
- Skillfully combine chunks and roles

Data Cookbook Help Page

Training Resources

IDATA UNIVERSITY

Andy Berry (Log out)   Help   Recent Updates

data cookbook®
Quick definition lookup...

Home   Definitions   Specifications   Quality   Data Systems   Organization   Community

Help

Training Resources

Resource	Description
Just-in-Time-Training Videos	Short videos that focus on specific features or tasks within Data Cookbook, such as creating a definition. Start here if you are a new user or if you perform a task within a workflow. Also includes workflow customization, specification templates, user groups, permissions, and other administrative tasks.
Workshop Wednesdays	This series offers topical discussions of features and best practices for Data Cookbook and data management. Videos are about 35 minutes long. Workshop Wednesdays are hosted live throughout the year and these are live recordings of sessions. The live sessions offer an opportunity to submit questions to IData staff. Use this series to interact with IData staff while you learn about a feature in depth.
Recorded Public Videos	Previously recorded webinars on various presented by IData that cover the Data Cookbook and Data Governance related subjects.
Upcoming Public Videos	View the schedule of upcoming Data Cookbook and Data Governance webinars.

Support

Support

Resource	Description
Email Support	Send an email to our dedicated Data Cookbook support for help with your specific question or issue
Phone Support	Call us toll Free at (877) IDATA44--(877) 432-8244--and press "1" for Data Cookbook support
Extra Data Cookbook Resources	Find additional client resources from Data Cookbook knowledge base for using and implementing the Data Cookbook.
Questions and Support forum	Browse questions asked by other users or post your own questions about how to work with the Data Cookbook.
System Announcements Forum	Find important announcements from the Data Cookbook development team, including information on recent updates to the application as well as planned outages

Documentation

Documentation

Document	Last Updated	Description
User's Guide	11/19/2019	Reference documentation for users of the Data Cookbook. The users guide includes descriptions of workflows and feature.
Administrator's Guide	09/18/2019	Reference documentation for administrators of the Data Cookbook. The admin guide includes information on configuring the account as well as managing permissions and designing worfklows.
External Authentication	08/21/2019	The Data Cookbook allows organizations to authenticate users through their existing authentication repositories. Currently it supports LDAP, Active Directory, CAS and Shibboleth protocols. This document provides details for administrators on configuring external authentication for your organization.
Test Instances	08/21/2019	Reference documentation for administrators and users who are working in the Test Instance of the Data Cookbook.
Metrics Dashboard	11/19/2019	Reference documentation for users for working with the Metrics Dashboard feature, which provides insights into your organization's usage of the Data Cookbook.
Private Community User's Guide	08/21/2019	Reference documentation for users who have access to a private community. This guide should be used in conjunction with the Data Cookbook User's Guide

More Support:

- Pop Up Help within Data Cookbook (triangle in lower right corner)

- Ask clients – Post to *Questions and Support* in the Forum

User Group Fall 2021

You will get registration link since you attended this session. Look for it.

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