Data Cookbook Progress Report

November 2017

Implementation Team

The membership of the Data Cookbook Implementation Team (DCIT) is:

- Mary Heather Smith, Office of Institutional Research
- Jennifer Lane, CIS Business Intelligence team
- Jeffrey Fox, Division of Biology and Medicine
- Meghan Hall, Office of the Dean of the Faculty
- Wendi Lewis, CIS Business Intelligence team
- Brook Moles, CIS Business Intelligence team

Our Charge

The team is charged with implementing a data dictionary for Brown University using the Data Cookbook, a highly regarded cloud-based data governance solution designed specifically for higher education. Data Cookbook was jointly selected for this purpose by the CIS Business Intelligence team and the Office of Institutional Research.

Initial Goals

For the implementation phase of the data dictionary project, we identified a number of goals, focusing on configuration, integration, policy, documentation, training development, and drafting/approval of definitions for key content areas.

Process

We began meeting in Fall 2016 and have met weekly since. As part of our initial Data Cookbook contract, we purchased a consulting package to support our implementation; we had regular conference calls with Data Cookbook staff to assist us in setting up the software and answer questions about best practices for the day-to-day use of the Data Cookbook.

In order to build on work that had recently been done to enhance the Faculty Information System (FIS), we began with the Faculty Affairs functional area, using faculty definitions to test and refine our ideas about how to configure and use of the Data Cookbook (i.e., set up permissions, draft definitions, design workflow, etc.).

Goals / Progress

Goal	Progress / Status
Establish a location for sharing information with the Data Cookbook user community.	**Complete.** Created Data Cookbook wiki space for sharing meeting minutes, data governance resources, and other information.
Enable Shibboleth authentication.	**Complete.** Authentication enabled with auto-creation of new accounts allowed, so any Brown community member may log in and view content.
Define core functional areas, technical systems, and user roles and groups.	**Complete.** Defined 15 functional areas, 9 data systems, and 14 user groups.
Develop a definition style guide.	**Complete.** Style guide shared in Data Cookbook wiki space.
Configure workflow to manage approval of both functional and technical definitions.	**Complete.** Configured two workflows—one for a functional definition with no technical definition, and one for a functional definition with technical definition(s).
Develop a definition lookup tool and embed it on the Data Governance website.	**Complete.** Users may look up approved definitions on the Data Governance website.
Develop integration with Cognos and Tableau content.	**Work in progress.** Using iData tools and recommendations, prototyped linking to Data Cookbook definitions from Cognos reports and Tableau dashboards. Seeking to improve both. Documentation of the integrations has not yet started.
Develop Cognos reporting capability on Data Cookbook activity and content.	**Work in progress.** A Cognos reporting package is being developed. Will clarify reporting needs with the DCIT. Reports to follow.
Engage users in five key functional areas: Admission, Financial Aid, Financial Services, Graduate School, and Advancement. *[Engagement is defined as both editors and moderators having been identified and having logged in, with at least one functional definition drafted and approved.]*	**Work in progress.**
Draft and obtain approval for 25 definitions in the Faculty Affairs functional area.	**Complete.** 42 functional definitions approved.

Goal	Progress / Status
Draft and obtain approval for 25 definitions in the Student functional area.	**Work in progress.** 14 functional definitions approved, 16 in drafting stage.
Develop training for definition editors and approvers.	Not started.
Develop reporting and analytics to assist with oversight of content development, e.g., track number of definitions in each stage by functional area.	Not started.

Next Steps

The DCIT plans to continue meeting until we achieve our implementation goals. At that point, the team will dissolve, turning over ongoing administration of the Data Cookbook to the Office of Institutional Research, with technical support from the CIS Business Intelligence team.

Recommendation

Ongoing adoption and development of the Data Cookbook will require a sustained effort to educate the community and encourage its use—both by content developers and by content consumers. It will be important to facilitate effective communication among stakeholders in different functional areas in order to ensure that data dictionary terms are appropriately and consistently named and clearly, correctly, and completely defined.

The DCIT believes that the simplest and most effective means of ensuring the long-term success of Brown's effort to develop a data dictionary is to establish a committee of stakeholders from the functional areas represented in the Data Cookbook.

This group would logically be composed of data stewards and/or their delegates. Service on such a committee aligns with the responsibilities of a data steward as outlined on our Data Governance website:

> **Data Steward**
> A data steward is a staff member with oversight responsibility for a subset of the university's data. The steward is typically a functional end user within an operational area who is deemed an expert regarding data managed by that operational area.
>
> Major responsibilities:

- **Implement data standards.**
  Ensure that staff who maintain data are trained to follow standards.
- **Monitor data quality.**
  Work with technical and operational staff to create a process for identifying data entry errors and correcting the data to match university standards. Report to the data trustee any issues that may require larger action on behalf of the university's data governance structure.
- **Handle inquiries about data.**
  Receive and respond to any inquiries related to data that originates from the area they oversee; e.g., questions regarding access, standardization, organization, definition and usage, etc.

If the Data Governance Committee adopts this recommendation, the DCIT would be happy to draft a committee charter for submission to and approval by the Data Governance committee. **We believe it is important that the committee charge officially emanate from the Data Governance Committee; that will convey the importance of the work and increase the chances of its being taken seriously and given high priority.**