

Approaches to Technical Definitions

Workflow Wednesday Series #9

March 6 2019

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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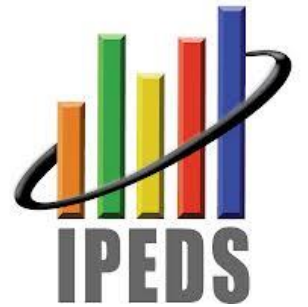
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Goals

- A technical definition identifies the location or calculation of a glossary definition within a specific data system. This session reviews several approaches to technical definitions, and includes tips on the level or type of detail needed by different metadata consumers. Consideration is given to using existing technical metadata repositories along with Data Cookbook.

Agenda

- What is a technical definition?
- What are typical approaches?
 - Editorial/Governance Approach
 - Style Guide
- Workflow support
- Calculations and Specifications
- Summary

What is a technical definition?

A technical definition identifies the location or calculation of a glossary definition within a specific data system.

Demo: Admitted Student

3 technical definitions:

In Banner tech def, wikilink:

Saradap_level_code

Sarappd_apdc_code

Select an Approach for each Data System

1. Editorial or Governance Approach
2. Style guidelines

Governance Approach – Enterprise

My Reporting ODS (5)

- Already well documented elsewhere for 10 years
- Dozens of skilled report writers
- Approach:
 - Optional
 - Keep it simple
 - Support experienced report writer
 - Support curious business user
 - Use regular definition workflow
 - Include all codes if relevant

My Student Information System (SIS)

- Sketchy doc; staff retiring
- Approach:
 - Required and Comprehensive; Exhaustive
 - Support new and experienced report writers
 - Support very motivated business user
 - Include calculation explanations
 - Conditional workflow mandating tech def and review

Style Guidelines – Enterprise

My Reporting ODS (5)

- Style guideline:
 - Table: FINAID
 - Field: e_fam_cont_annual

My Student Information System (SIS)

- Style guideline:
 - Varies
 - Narrative is acceptable
 - Query dump is acceptable
 - Create links to schema

Sample definitions - Enterprise

- My Reporting ODS (5)

- Admitted Student
- Aid Accept Percentage
- Aid Year
- Current Fiscal Period
- Expected Family Contribution

- My Student Information System (5

with tech demo filter)

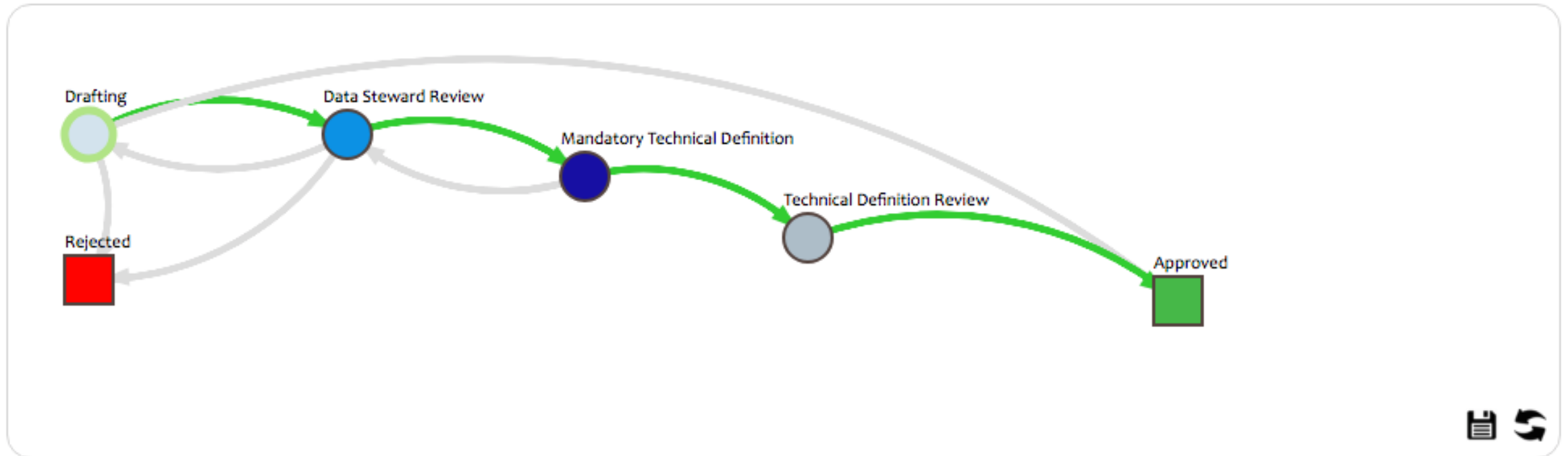
- Account
- Aging Period
- AR Amount
- Expected Family Contribution
- Retention Rate

Conditional Workflow to support mandatory technical definition

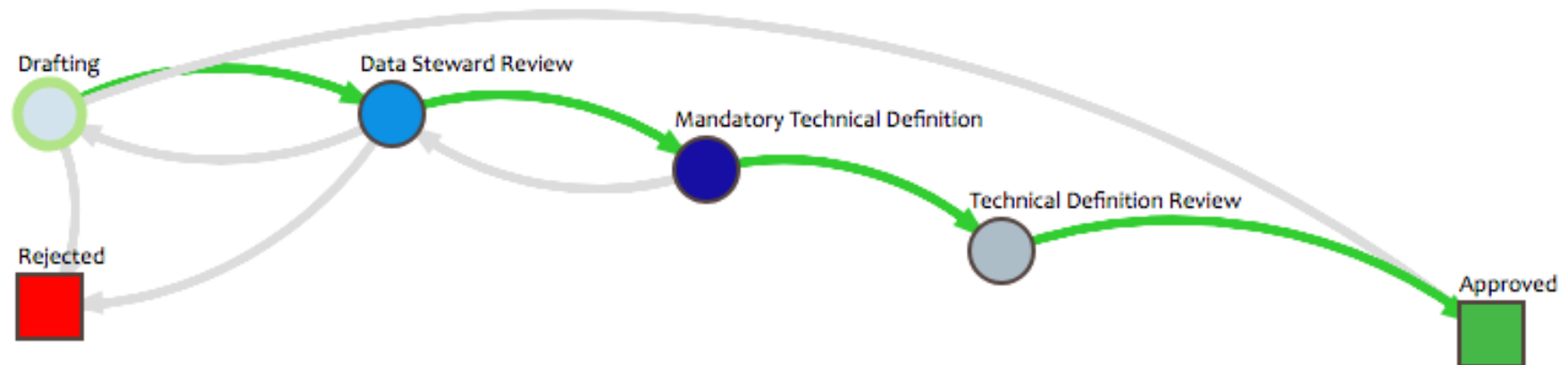
Conditions: ⓘ

Data System is My Student Information System (SIS)

Diagram: ⓘ



Workflows compared



Why use a specific approach?

Consistency !

- Allocate effort and resources
- Governance
- Effectiveness/User Expectation/Readability

Summary

- Define approach per Data System
- Use the resources you have
- Use workflow to support your approach
- Update Standards document to reflect decisions

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Extra slides

Hierarchy of Calculations or Counts

- ALWAYS TRUE – functional definition
 - Full time or Part time student > enrolled in 12 or more hours in current term; enrolled in 11 or fewer hours in current term
- TRUE FOR THIS DATA SYSTEM – technical definition
 - Admitted Student
- TRUE FOR THIS REPORT – Specification
 - Current GPA