

## Featured Client Profile:

*"The Data Cookbook made a very large and potentially insurmountable task much easier. I don't think we would have been able to meet the objective of this project if we didn't have this tool."*



Confronted with the University of Richmond's preparations for its Advancement Department's capital campaign, Project Manager and Business Process Analyst Kerri Chapman was discovering problems that could be traced back to their data definitions. "[We] had been finding that some of the reports coming out of our ERP system (Banner) had totals that weren't lining up with other reports," said Chapman. "There was a need to make sure that everyone was on the same page as far as terms were concerned."

While some of the terms were already living in a static Word document, the demand for consistent data definitions within a dynamic data dictionary prompted the University of Richmond to consider alternatives. As Chapman told us, "Spreadsheets do not allow for multiple people to be using them simultaneously, and we wanted something that was living and breathing with multiple users working in it at the same time." In addition to resolving the collaborative shortcomings of their existing tools, Chapman saw the potential of connecting related technical and functional terms to one another. "We wanted to have terms that could be related to each other in a Wiki-style format," said Chapman.

After the MABUG (Mid-Atlantic Banner User's Group) convention, Chapman and her colleagues knew the Data Cookbook could be the right solution. "We knew there wasn't another tool that was specific to this purpose for higher education. We were looking for something that would meet a light, technical need and a business need as well." In addition to appreciating the Cookbook's operational purpose and ease of use, Chapman and the University liked how the Cookbook could knock their two biggest problems out of the park. "We chose the Data Cookbook for a combination of two things. First, the collaboration features – given the nature of our project, we knew we would create approval queues where multiple people could be working in the tool at the same time." The data stewards' ability within the Cookbook to link, refer and highlight within a definition also allowed Chapman and her colleagues to quickly realize the benefits of connecting related terms. "For example, a definition for 'gift' might include the word 'donor'," said Chapman. "Our being able to relate those two terms so easily really made the Data Cookbook a winner for us."

Since becoming one of our Data Cookbook clients, Kerri Chapman has been thrilled with iData's customer and technical support and hustle, along with the benefits of our client community of higher education institutions. "There were some pseudo-major problems we experienced in the beginning, and they were addressed by the next business day. It was really great to have that kind of responsiveness. Furthermore, there were one or two things we posted in the forums to get some general feedback, and we got a very quick response from there." As the University realizes the potential of the tool, there are process improvements and best practices that Chapman looks forward to putting into place. "We will establish a stewardship team within the division to serve as the approver, so if someone requests a definition to change, it will go through the appropriate process." The simplicity of the tool and existing framework facilitated adoption as well. According to Chapman, "One of our team members said the Data Cookbook was 'dummy proof', even though we really didn't have an orientation. We all followed the guide and had the demo, then just dove right in."

We are thrilled to see that Kerri Chapman and the University of Richmond have found the Data Cookbook a vital and useful tool for their information systems and institutional reporting. As a subject matter presenter at the MABUG 2010 Conference for 'Mise En Place for a Data Dictionary', Chapman knows very well how properly establishing a data dictionary can prevent all kinds of problems downstream for higher education institutions. Just as having all of the ingredients for a dish ready and prepared before cooking helps for making a better meal, the act of herding different functional interpretations and technical queries into coherent data definitions makes for better reporting, collaboration, and results.



---

### **About the University of Richmond:**

The University of Richmond is a private, highly selective, liberal arts university founded in 1830. Five schools offer nearly 60 undergraduate, master's, and law degrees: School of Arts and Sciences, Robins School of Business, Jepson School of Leadership Studies, Richmond School of Law, and the School of Continuing Studies. Since 2005, Richmond students have been recipients of the Rhodes, Marshall, Goldwater, Clarendon, Truman, and Fulbright scholarships, among many others.

The University of Richmond has been named a "Best Value" college by *U.S. News & World Report*, *SmartMoney*, *Kiplinger's Personal Finance*, and *USA Today-Princeton Review*. For more information, please visit the University website at [www.richmond.edu](http://www.richmond.edu)

### **About IData Inc.:**

Since 2004, IData has assisted higher education institutions in becoming more successful with their administrative systems and reporting processes. Our consultants focus strictly on higher education and provide [consulting](#) in three primary areas: Technology Services (custom development and system integration), Institutional Research Services, and Implementation Services. With a client list including a wide-ranging and diverse set of institutions, IData is a recognized leader in the field and continues to offer innovative solutions. IData is committed to offering the best service possible to our clients and to delivering appropriate, timely, and robust solutions.

*IData's Mission: Increasing the productivity of colleges, universities, and institutional research professionals through better use of administrative and data systems.*

IData also draws upon the skills and experience of our innovative staff to develop software as a service (SaaS) products designed to help universities be more productive and successful. IData's flagship SaaS product is [DataCookbook.com](http://DataCookbook.com) – a collaborative data dictionary and data management tool for higher education.

### **About the Data Cookbook:**

[DataCookbook.com](http://DataCookbook.com) is a process improvement tool that actually does improve the reporting process by applying key reporting best practices. Written by reporting professionals and Higher Education IT experts, the Data Cookbook provides a central, highly visible location to store all of the details of your institution's reporting terminology and report specifications. This helps improve the visibility of existing reports, and provides clear, agreed upon definitions of institutional terms for creating additional reports.

The Data Cookbook was developed by IData as an integral component of iData's Institutional Research reporting services. For more information on how IData can help your institution be more successful with Institutional research and reporting, please visit our Reporting Services site at [www.idatainc.com/reporting](http://www.idatainc.com/reporting)