



User Experience Field Study

Meta Integration

PROJECT DESCRIPTION

The Enterprise Metadata Team will be launching a new release of the Metadata Tool around the Q1 timeframe with a new feature of role-based tasks within the new system. To determine these tasks, 20 interviews were conducted during the months of November and December 2007. Two to three known representatives from each category (Business/Technical Analysts, Source Stewards, Governing Body Steward and ETL Developer) were conducted to assess the usability of the tool, determine new use cases for both existing and new roles in the system.

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May 20, 2009

PROJECT SPONSOR + BUSINESS OWNER

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HISTORY AND OVERVIEW

The Meta Integration Team requested a user experience field study to support a more in-depth response beyond the “Voice of the Customer” of the Metadata Tool, workflow processes, and supportive training materials, used by internal employees. Metadata has in the past and continues to play a critical and evolving role of Governance within the Bank.

To learn more about the User Experience Field Study proposal check out:
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The purpose of this study was to:

- Understand current user behavior with the metadata tool
- Assess user needs for metadata
- Discovery of new uses cases based on existing and new roles
- Inform Metadata Team of usability and technical requirements

The metadata tool began three years ago in the <removed> Division. There was a small amount of lineage and little adoption of the tool. Currently it is also being used very little in the enterprise level despite the growing importance of metadata.

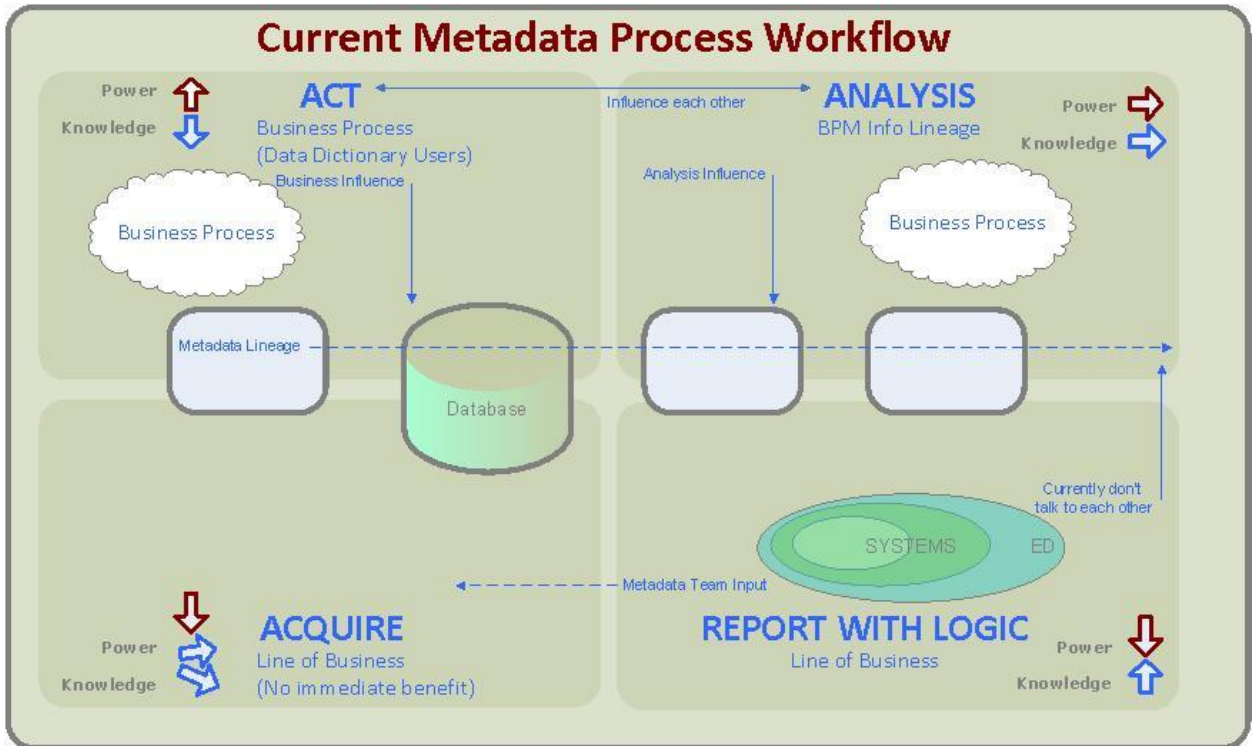
The lack of adoption is primarily from the lack of usability and basic navigation within the tool. The original requirements for the tool included issues around usability and performance improvements but were subsequently dropped with future requirements. The next version is supposed to include more usability enhancements but it is undetermined what those will be from the vendor and whether they will meet the needs and expectations of the current users.

The Tool originally met the initial the functional requirements for the first milestone but in order for the tool and processes to mature, it will require more dedicated business process and resources to encompass the needs and expectations of the stakeholders within the system.

The following diagram, at a high level, shows four quadrants of the metadata workflow:

1. Act
2. Analysis
3. Acquire
4. Report with Logic

The other aspects of this diagram besides the four categories are the communication, power, knowledge and the influence groups have over each other. The diagram provides the metadata lifecycle as well as the potential areas needed to mature the people process. The technology plays only a part to the larger process solution.



The new release of the Metadata Tool should include role-based definitions and permissions. This is not only important for ease of use in the user interface by limiting the amount of information a user needs to consume or navigate through, but for governance to appropriately guide the flow of metadata through the system to develop consistency and predictability therefore building trust and reliability in the system and process.

HIGH LEVEL FINDINGS

- Who does metadata serve?** There is a fundamental need for WaMu to define what metadata means to them. It is not enough to say "data about data" nor can it be described as a "service" because that is too high of a level. The tool is broken in major ways and is not fully developed both in application and process. Technology is only a piece of this workflow. Information is more than data.
- Use Cases:** Due to the lack of usage of the Metadata Tool, it was not possible to capture detailed workflow usage with the tool, however, several primary high level use cases emerged as well as a collection of various system models across the divisions.
- Big Picture System Workflow:** Users do not understand how their work fits into the larger workflow. All groups were found to be working in a siloed state. Each group has their own process and communication within their group but it rarely transfers to another.

4. **Training Materials:** The training materials need to provide a learning context to the users work. There needs to be a common vocabulary understandable for all roles in the system as well as a workflow.
5. **<Form>:** This is the current access into environments but it can take months before groups get their work uploaded to the tool. Users are frustrated with the timeliness of this process and do not allow them to do complex work. They view this as a tool for a linear process but they also worry about the validity of the data. From the administrative point of view, this is due to a lack of priority, vision or roadmap around this process.

In general, users do not think this tool is a requirement in the PMLC/SDLC processes when in reality the process is integrated.

6. **Process and communication:** Workflow, <form> Process requirement, explicit work context in the tool, user interface.
7. **User Interface:** Usage of this tool was so low therefore this study does not cover detailed user interface issues. The UI issues are at a very high level of navigation and search. The following table represents these high level findings. For a complete view of the interview comments, review this document located <removed>

<Note: Removed a majority amount of the report data to preserve confidentiality>