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Design & Build Data Collection Part 1

After completing multiple discovery sessions around data collection, we can begin designing and building data collection structures that may include an overlay entry sheet example, a flat file entry example as well as standardized data columns and or external connections. We first center around the process of customizing an overlay entry sheet that a customer may have provided during their initial alignment and discovery phase and as previously highlighted helpful to ground as part of the conversation of tailoring and data contributors and data entry that would be taking place for that customers topic as well as potentially aligned industry requirements. We return to a sample and customer tailored entry overlay page where a customer has decided to keep this format as part of their process of inputting information whereby we've seen a break out of there different quarters and we can zoom in to see some of that placeholder text information as well as the summary at the end of the year. After the discovery journey of confirming how the customer is looking to capture this data and at what cadence, we can talk through what the design requirements and elements would be to set up the flat file and also tailor and customize the data validations to match their corresponding metrics. The flat file that is provided as part of the base solution template has a structure where there is a topic a year, data type and then four Tags which can be tailored to that subject matter and the customer requirements on what are key pieces of information that are helpful to organize the values that are entered. The value itself is linked back to the overlay sheet and then respective comments which could also be included in the overlay sheet as well as progress tracking if it's helpful to have these associated with the people that are doing the data review after the entry process. We've frozen the panes here just to keep the headers aligned at the top and we can talk through a specific example as to how each one of these selections built off of the overlay sheet line items. If we navigate here to the first line item on row 15 of human rights and that were automatically escalated, we notice here that there is a capture process that is happening across the first quarter with this column aggregating those values. This cell value is specifically linked to the flat file and we can see the number six below as well as the direct formula reference to the overlay sample. But furthermore, we also highlight how we've organized these tags in order to capture that key information. So you'll notice that for this structure, grievances received is the top hierarchy for these line items and then grievance resolution is also the top hierarchy for the next line items indigenous communities, local community engagement resettlement, community support and investment. So this highlights to the implementer that these are potential good short list of items that we would set up for our data validation as well as our tags. On this sample we've established the data validation Under the structure of Tag 1, 2.,3 and four as well as the data provider reviewer and status. In order to select the fields that will allow us to pick the dropdowns.

So we'll first recognize that grievances received is one of the tag options that is listed as well as resolutions, community's engagement, resettlement, support and investment and community investments. These are all highlighted as part of the overlay sample. There is flexibility on what tags are important to define so we recommend communicating with the customer team to confirm that this tag structure makes sense and is supported of their process. This communities since this captures the broad base of rows of the metrics that they are capturing centers around the topic section and disclosure conversation on if they are aligning to a specific framework we did notice that there were GRI specific codes mentioned and these codes relay to this specific dropdown list. This list is populated via the input section and we can actually confirm what section is feeding these data validations by going to data validations and selecting our topic, selecting edit and we can see that mapping dropdowns which is under the inputs field feeds the look up of the topic section and disclosure that is consistent across our base template frameworks and standards. You can also confirm where that incoming connection points from which is a query that says mapping collection which is a query that provides this output.

Since this is something to also select and coordinate with the customer team we recommend the implementing team first established this selection based on what they understand the data entry to be and then also the setup of the tags. So we can highlight here the tag 2 we've actually named here our second row to localize with the naming convention that is consistent with that customer team, which in this case would be a metric. The metrics match the overlay sample so if we navigate from top to bottom, human rights and obligation resettlement, relocation, land compensation, land encroachment, these are being measured and the metrics follow linearly in sequentially from the first categories of the overlay center. We identify a unit of measurement where this customer team is calling out if this is account entry, a text entry, even a currency entry. Since this is also organizing data, we've recommended to set up a tag that highlights that kind of entry as well. And then lastly within the overlay sample, we also recognize a time period. The time period has also been defined in the data validation for that template. We've defined quarters as well as year to date as well as flexibility in defining who would be that customer teams, providers of data and reviewers and approvers.

In this example we have set up one quarter and then also set up an example for a year to date capture which would update as well if there were additional quarter entries, we can replicate this single quarter by copying the set of rows, inserting them down below before the year and mapping the corresponding values and comments from the overlay sample. So we'll follow through this formula, we would just update this mapping to reflect whatever that next quarter would be captured in this case might be Q2, Q3, or Q4. After setting up an initial draft of this data collection flat file and also edits to the overlay entry sheet if applicable, we would establish an outgoing Wdata connection to the data collection table of our base template model. We would call it here incidents flat sample overly for description and then we'll toggle the column mapping the column wrappings match and it is not case-sensitive but it is character sensitive. The titles of the columns of our flat file which are namely topic year, data type, the tags, value, data provider, reviewer status and commentary. If these do not match, then we would see a check mark that is not defined, so it would not be green and we would have to manually select which column corresponds to the Wdata table that populates that column. We recommend just inserting a second row if you need to modify the naming convention as it's helpful to have all these green check marks automatically match the columns in the Wdata table. Once we hit finish we'll establish this connection thereby capturing and loading this data into the Wdata connection table.

We can see this connection under our outgoing connections and it's common to see multiple data connections that are outgoing across the different topics that would be set up for a customer team in our outgoing connections. If we click the data collection table, it will open corresponding new tab in Wdata and it will also highlight that table where the data is falling. We can see the column names, descriptions are optional, but more specifically the column IDs were made data maps accordingly and the data type, which is all set to text by default. As we navigate on the right-hand pane, you'll notice the different sets of data that are already present within this Wdata table. This Wdata table will be able to continue consuming and adding additional information as it entered. And this Wdata table is then used by the queries that populate the factbook to generate the results that prep the content for staging.