

## Overview

This document summarizes PLU's interviews with OneCMS stakeholders and subject matter experts. PLU's goal was to map various perspectives from both of the employees who will use the tools within the ecosystem and the employees who ingest the assets into the platform. Our goal was to identify skill gaps and uncover where there are unclear or undefined processes.

## Key Stakeholders and Subject Matter Experts

- Amanda SubbaRao, Director Content Structure
- Jennifer Lawrence, Director Content Structure
- Jen Raimi, VP Content Strategy
- Will Paladino, Sr Instructional Designer
- Malinda Weed, Metadata Sr Editor
- Current OneCMS users: Editors and Project Managers assigned to "Collections"

## Summary of discussions

### Current mindset reflects

- Confusion because processes are not established
- Differing levels of insight into strategy shift (high level vs. detail oriented)
- Desire to understand interdependencies and factors that impact one's accountabilities
- Desire to be successful in using the system

### Skill Gaps

- Wide range of metadata literacy and acumen across roles and functional areas
- Understanding of skills & accountabilities required to use OneCMS tools
- Understanding of interdependencies and factors that impact ability to deliver and design modular content

### Organizational factors to consider

- Even though processes aren't defined, business needs to implement immediately

### Ideas for training format and topics

- Provide ongoing just-in-time training options as process and technical requirements evolve
- Establish central communication hub for training material for easy access by employees
- Throughout training curriculum, provide opportunities for cross-functional discussions and interaction
- Define and explain key process and conceptual framework in the context of HMH examples
- Establish a common vocabulary for understanding COM (Content Object Model)

### Preliminary training proposal

This training is intended as follow-up to the general OneCMS training provided by TG, to focus more specifically on issues related to metadata—process, best practices, issues to consider, etc. Use context/real examples to illustrate.

**Audience** Anyone who takes the general training and is working in OneCMS would be a candidate. Focus is on editors but others could attend. *Collections K5* and *6-8* will be our pilot group, then we will refine before larger roll-out. Also need to be prepared for vendor training.

**Training format** TBD. Live sessions with short recordings for later review? Or all online with follow-up Q&A sessions?

Prerequisites

- Metadata Ecosystem & COM presentation
- OneCMS First Look Demo
- TG OneCMS training

**Evaluation Strategy** Embed assessment and knowledge check as appropriate (during and at completion). Follow up with OneCMS Champions to work and check in with employees on progress. Final evaluation is the successful delivery of “Collections” to the platform.

### OneCMS Foundational Skills

#### High-level intro to OneCMS Metadata

Topics covered:

- What use is the metadata—why do we do this?
- Internal vs. customer use, depending on field
- Two types of metadata in OneCMS: “properties” with objects in OneCMS, and “structural” relationships based on references and the structures they build
- Properties metadata should not reference relationships or structure (e.g. the word “unit” or “lesson”.) If it changes if you move the object, it doesn’t belong on the object.

*Audience: All (esp Editorial)*

*Format: Live interactive webinar*

*Duration: 1 hour*

*SME input: Content Structure Directors*

*Resources: Employee generated knowledge, PLU production and facilitation*

#### What are the metadata fields for each object type, and what do they do?

Topics covered: Repurposed content from COM resources

*Audience: All (esp Editorial)*

*Format: Live interactive webinar*

*Duration: 1 hour*

*SME input: Content Structure Directors review of repurposed content*

*Resources: Employee generated knowledge, PLU production and facilitation*

#### System functionality (how to & tips/tricks)

Learning Goal: To build foundational knowledge of system functionality

- Add metadata when creating a new object
- Add/edit metadata to a single object that already exists
- Add/edit metadata to more than one object at a time using “Edit Common Properties”
- Run a metadata report on a folder
- Run a metadata report on a Product Set or Product Object
- Add/edit metadata by uploading an edited metadata report\*
- Add/edit metadata by applying folder rules\*
- Search for objects using metadata
- Correlate objects to a standard and/or standard set

*Audience: All (esp Editorial)*

*Format: Short Videos with Quick Guides*

*Duration: 1 hour*

*SME input: Content Structure Directors review of repurposed content*

*Resources: Employee generated knowledge, PLU production and posting on intranet*