

# Proposed Tools for a Data Concierge Service

Visual Report

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# This report outlines recommended tools for a Data Concierge Service (DCS).

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This report is user-driven. It can be viewed linearly by scrolling through the slides or interactively by clicking on the Table of Contents and hyperlinked  to jump between sections.



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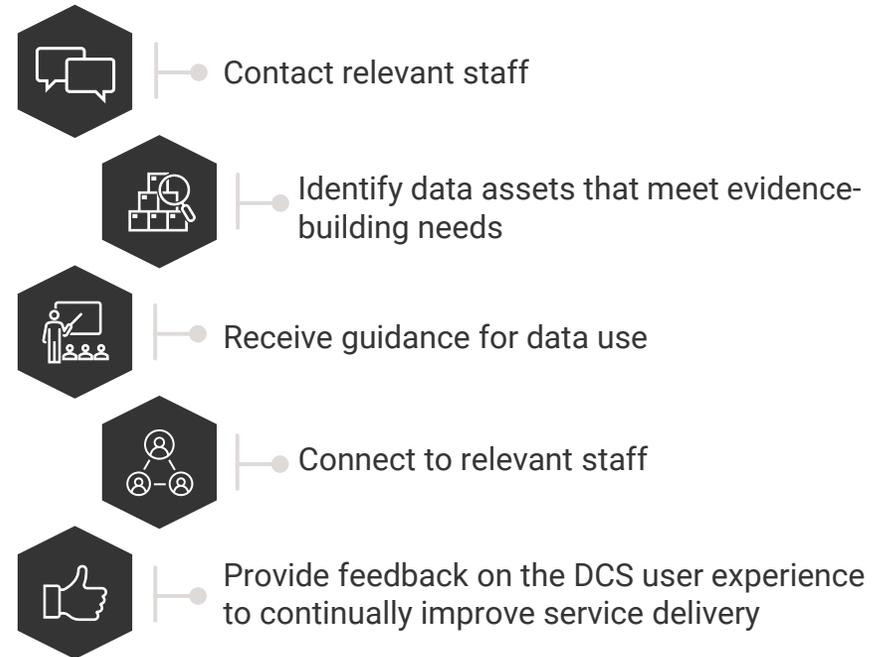
Components

Tools

Personas

# Background

A potential future DCS will provide information and referrals to help users discover, access, and use federal statistical data. Tools support these services.



Recommended tools are based on our findings from an environmental scan, which included...



Interviews with federal statistical agencies and data users



A landscape review of existing concierge services



DCS\_23\_N03 Environmental Scan and Outreach Final Report delivered June 2024

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# Components

We defined ten core functional components of a DCS, which help mitigate challenges data users face when discovering, accessing, and using data.

The components drive the requirements for proposed DCS tools. For more detail on the DCS proposed models and components, see DCS-23-N03 Data Concierge Model Final Report: Two Proposed Data Concierge Models.



**Standardize User Support:** Support should be universal to users, standardized across agencies, and repeatable in terms of processes.



**Improve Data Navigation:** Terms of access should be streamlined and various options for accessing data should be presented.



**Connect Users to Experts:** Data users should be able to pose questions and get connected with subject matter experts.



**Direct Users to Existing Services:** Help audiences discover existing data-related products, services, and forms by using methods already familiar to them.



**Enable Data Evaluation:** Users should be able to leverage existing information to assess the fitness, gauge value, and find tips for existing data.



**Manage User Relationships:** User interactions with the DCS should be logged and analyzed to identify potential service improvements.



**Support Cross Agency Requests:** Users should be supported in identifying and requesting access to data from multiple agencies.



**Communicate Coverage and Completeness:** The completeness of, or plans to grow, data inventories should be communicated to users.



**Create a Corporate Voice:** Service offerings should be communicated to users, along with updates to services, through touchpoints like newsletters.



**Uphold Data Governance:** The service offerings of the DCS should be reviewed by an expert steering committee who makes recommendations.

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# Tools

Our proposed tools achieve three main tasks.

We organized the tools by the types of services they provide.

[→ Summary](#)



### Customer Relationship Management Tools

These tools standardize user support, manage user relationships, and connect users to experts.

[→ CRM Examples](#)

[→ CRM Details](#)



### Content Management System Tools

These tools improve data navigation, enable data evaluation, and communicate coverage and completeness.

[→ CMS Examples](#)

[→ CMS Details](#)



### User Interaction Tools

These tools direct users to existing services and support cross agency requests.

At more advanced service levels, user interaction tools, including a chatbot, support the other two tool types.

[→ UI Examples](#)

[→ UI Details](#)

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→ CRM Details

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# Tools : Customer Relationship Management

## Examples of proposed Customer Relationship Management (CRM) tools along a self-service to full-service continuum

The CRM tools standardize user support, manage user relationships, and connect users to experts.

	SELF-SERVICE	ADDITIONAL FUNCTIONALITY	FULLER SERVICE	FULLEST SERVICE
Staff Contacts	<b>Contact Lists:</b> DCS could provide a single location for users to find an agency expert or admin contact. <i>List of emails from agency sites or links to agency sites for contact information.</i>	<b>Contact Forms:</b> DCS could provide a method for users to submit requests to an administrative contact. <i>Public-facing online contact form that connects users to relevant administrator or contact.</i>	<b>Contact Harvesters:</b> DCS could automatically collect agency contact information and ensure content on DCS site is current. <i>List of emails from agency sites, auto-populated from knowledge.</i>	<b>Searchable Contact Database:</b> Building on the content harvester, DCS could host a searchable catalog of agency contacts. <i>Searchable catalog or database of contact information.</i>
Forum/ Feedback		<b>Feedback Form:</b> DCS could enable users to publicly interact with other users or DCS staff for the purposes of providing feedback. <i>Public-facing online feedback form that allows users to post comments and questions to other users or administrators.</i>	<b>Ticketing System:</b> DCS could maintain a system for tracking users' questions and feedback they receive. <i>Tracks, triages, and categorizes staff contact requests and feedback.</i>	<b>Database of Previous Interactions:</b> DCS could use a searchable database of all user questions and feedback. <i>Catalog or database of stored user interactions.</i>
Administration				<b>Dashboard:</b> DCS develop dashboards to monitor ticketing system data and site usage. <i>Tracks usage metrics, such as engagement and number of requests, made via staff contact and user forum tools.</i>

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# Tools : Customer Relationship Management

## Details about CRM tool functions

CRM tools coordinate and systematize interactions between DCS users and federal statistical system staff.

### Context & Value-added to the DCS

The management of interactions with federal data users is largely on a per agency basis and varies from having a dedicated CRM system to no active management.

Depending upon the CRM tools chosen, the DCS might include live support during business hours from DCS help desk staff and/or a public-facing automated system to submit requests for concierge assistance.

By implementing a CRM, the NSDS would be empowered to understand federal data users' needs and federal data usage.

### DCS Staff Interaction with Customer Relationship Management tools

The DCS could be responsible for staffing the customer service requests for assistance as well as maintaining and updating an automated CRM knowledge base.

A customer relationship management system would create a ticket each time a user submits a question or request.

All user tickets and solutions could be used to identify gaps in services and propose enhancements.

### Potential Tools as Solutions

Based on web-based market research and tools already used within evidence-based community, there are several solutions on the market that can address the functional requirements of the customer relationship management components.

Those providers include, but are not limited to:

- Salesforce
- ServiceNow

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# Tools : Content Management System

## Examples of proposed Content Management System (CMS) features along a self-service to full-service continuum

The CMS tools improve data navigation, enable data evaluation, and communicate coverage and completeness.

	SELF-SERVICE	ADDITIONAL FUNCTIONALITY	FULLER SERVICE	FULLEST SERVICE
Data Documentation/ Metadata	<b>Metadata Lists:</b> DCS could provide a single location for users to find information about agency data. <i>Links to agency sites for metadata.</i>	<b>Metadata Search Forms:</b> DCS could provide a method for users to submit data documentation requests to an admin contact. <i>Public-facing online request form for help finding data.</i>	<b>Metadata Harvesters:</b> DCS could automatically collect metadata and data documentation to ensure content current. <i>List of metadata from agency sites, auto-populated from knowledge base.</i>	<b>Metadata Storage:</b> Building on the metadata harvester, DCS could host a searchable catalog/ database of agency metadata. <i>Searchable catalog or database of stored metadata.</i>
How-to-Guides/FAQs	<b>FAQ Lists:</b> DCS could provide a single location for users to find relevant agency FAQs. <i>List of agency FAQs. Links to agency sites for FAQs.</i>	<b>FAQ Forms:</b> DCS could provide a method for users to submit general questions to an admin contact. <i>Public-facing online request for questions.</i>	<b>Ticketing System:</b> DCS could maintain a system for users to submit data-related questions and receive feedback. <i>Tracks, triages, and categorizes user data documentation and FAQ requests initiated by users.</i>	<b>Database of FAQs:</b> DCS could host a searchable catalog/database of FAQs. <i>Searchable catalog or database of DCS FAQs.</i>
Administration				<b>Dashboard:</b> DCS could use the ticketing system to develop dashboards to help improve service. <i>Tracks usage metrics, such as engagement and number of requests, made via data documentation and FAQ tools.</i>

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# Tools : Content Management System

## Details about CMS tool functions

CMS tools centralize and connect existing resources, though the extent to which user search and automation are supported depends upon the tools chosen.

### Context & Value-added to the DCS

Content management tools allow for the creation, editing, organizing, and publication of content.

Potential tools range from basic to a fuller, more advanced set of features. Basic content management could include populating and manually editing content on DCS website HTML. More advanced tools would allow a DCS to bring together disparate information into a single searchable database that automatically keeps website content up-to-date.

### DCS Staff Interaction with Data-related Content Management tools

The DCS could be responsible for developing and curating the content management knowledge base. The system would be used to manage and develop content for the main website, including links to existing federal data assets. From there, additional functionality could be built. The staff would be responsible for integrating users' requests/questions from the CRM and utilizing the CMS to direct users. User content could be used to improve CMS functionality.

### Potential Tools as Solutions

Based on web-based market research and tools already used within evidence-based community, there are several solutions on the market that can address the functional requirements of the content management components.

Solutions include, but are not limited to:

- Drupal
- Pages by cloud.gov

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→ UI Details

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# Tools : User Interaction

## Examples of proposed User Interaction (UI) tools to support fuller service features of a CRM and/or CSM

The UI tools direct users to existing services and support user engagement.

	BASIC	INTERMEDIATE	ADVANCED	MOST ADVANCED
Chatbot			<b>Contact Staff Chatbot:</b> Navigate contact lists to connect users to staff.	<b>Search Data Documentation Chatbot:</b> Navigate documentation to connect users to data.  <b>Answer Frequently Asked Questions Chatbot:</b> Navigate how-to guides and questions to connect users to answers.
Administration			<b>Ticketing System:</b> Track user interactions to improve DCS services.	<b>Dashboard:</b> <i>Tracks usage metrics, such as engagement and number of queries issued via chatbots.</i>

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# Tools : User Interaction

## Details about UI tool functions

User interaction tools centralize and automate access to data-related resources.

### Context & Value-added to the DCS

A chatbot is a computer supported program with which users can interact. Chatbots offer users the benefits of posing questions in plain language. Chatbots have been shown in many instances to be preferred by users over manual contact attempts with individuals.

This tool could help guide users' requests, support user engagement, and reduce the DCS staff interaction and resource requirements.

The chatbot would be integrated into the CMS and CRM and rely on agency metadata and FAQ documentation.

### DCS Staff Interaction with User Interaction tools

DCS staff would be responsible for organizing, curating and updating the CMS and CRM with the necessary information to train the chatbot. As shown on the right, many CRM and/or CMS solutions have built-in chatbot offerings that can access content and provide answers based upon information in those systems. Staff would need to monitor the effectiveness of the chatbot and respond to user feedback.

Interactions with chatbots could be logged using administrative tools and analyzed to address gaps in services through planned enhancements.

### Potential Tools as Solutions

Based on web-based market research and tools already used within evidence-based community, there are several solutions on the market that can address the functional requirements of the chatbot components.

Potential chatbot solutions include, but are not limited to:

- Virtual Agent by Service Now
- Agentforce by Salesforce

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# Tool Menu Summary

Grouping	Components	Function	Tool	Types
 Managing Customer Relationships	 Standardize User Support	Contact Staff	Contact Lists	List of emails from agency sites
			Contact Forms	Links to agency sites for contact information
			Contact Harvesters	Public-facing online contact form
	 Manage User Relationships	Forum/Feedback	Contact Storage	Auto-populated list of emails from agency sites
			Feedback Forms	Searchable catalog or database of contact information
			Feedback Storage	Public-facing online feedback form
	 Connect Users to Experts	Administration	Ticketing System	Catalog or database of stored user feedback
			Dashboard	
 Managing Data-Related Content	 Improve Data Navigation	Data Documentation	Metadata Lists	List of metadata from agency sites
			Metadata Search Forms	Links to agency sites for metadata/documentation
			Metadata Harvesters	Public-facing online request form for help finding data
	 Enable Data Evaluation	How-to-guides	Metadata Storage	Auto-populated list of metadata from agency sites
			FAQ Lists	Searchable catalog or database of stored metadata
			FAQ Forms	List of agency FAQs
	 Communicate Coverage & Completeness	Administration	FAQ Harvesters	Public-facing online request for questions
			FAQ Storage	Auto-populated list of FAQs from agency sites
			Ticketing System	Searchable catalog or database of DCS FAQs
	Dashboard			
 Managing User Interactions	 Direct Users to Existing Services	Chatbot	Contact Staff Chatbot	Navigate contact lists to connect users to staff
			Search Data Documentation Chatbot	Navigate documentation to connect users to data
			Answer Frequently Asked Questions Chatbot	Navigate how-to guides and questions to connect users to answers
	 Support Cross Agency Requests	Administration	Ticketing System	
			Dashboard	

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# Personas

We illustrate user pathways through personas.

The following sections present walkthrough examples.

*Click on the buttons to navigate through personas & examples*

→ Home page



### ROLES

### ACTIONS

### PERSONAS

#### DCS users

Federal agencies (statistical; non-statistical); non-federal researchers; state, territorial, local, and tribal governments; nonprofits

**Discover:** Identify, locate data

**Access:** Request, obtain data

**Use:** Analyze, perform evidence-building activities with data

→ Discover



→ Access



→ Use



#### DCS staff

Staff from federal agencies or dedicated (new roles)

Support users with data discovery, access, and use

Maintain and administer the DCS

Identify service enhancements using analytics

**Explore:** Track DCS site analytics

→ Explore



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# Home Page

This is an example of the Home Page layout and tools



Menu

Help Tools

Search bar

Search tools

The screenshot shows the home page of the Data Concierge Service. At the top left, there are logos for the Interagency Council on Statistical Policy and the National Secure Data Service. The main header reads "DATA CONCIERGE SERVICE" with the tagline "Get help discovering, accessing, and using government data". To the right of the header are navigation links: "About", "News", "Tools" (highlighted with a blue underline), and "FAQ". Below the header is a search bar with a magnifying glass icon and the placeholder text "Search other users' questions". To the right of the search bar are "Search tips" and the URL "ResearchDataGov.org". On the right side of the page, there are two orange buttons: "Get Staff Help" and "Get Chat Help", each with a corresponding icon. Below the search bar, there are three columns of content. The first column, titled "Popular Search Terms", lists "aging", "COVID", "immigration", "inflation", and "unemployment". The second column, titled "Type", lists "Persona", "Organization", and "Literature" with small images. The third column, titled "Coverage", lists "12,577 data assets", "1984 - present", "12 federal statistical agencies", and "57 state, local, & tribal governments".

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# Personas : **Discover**

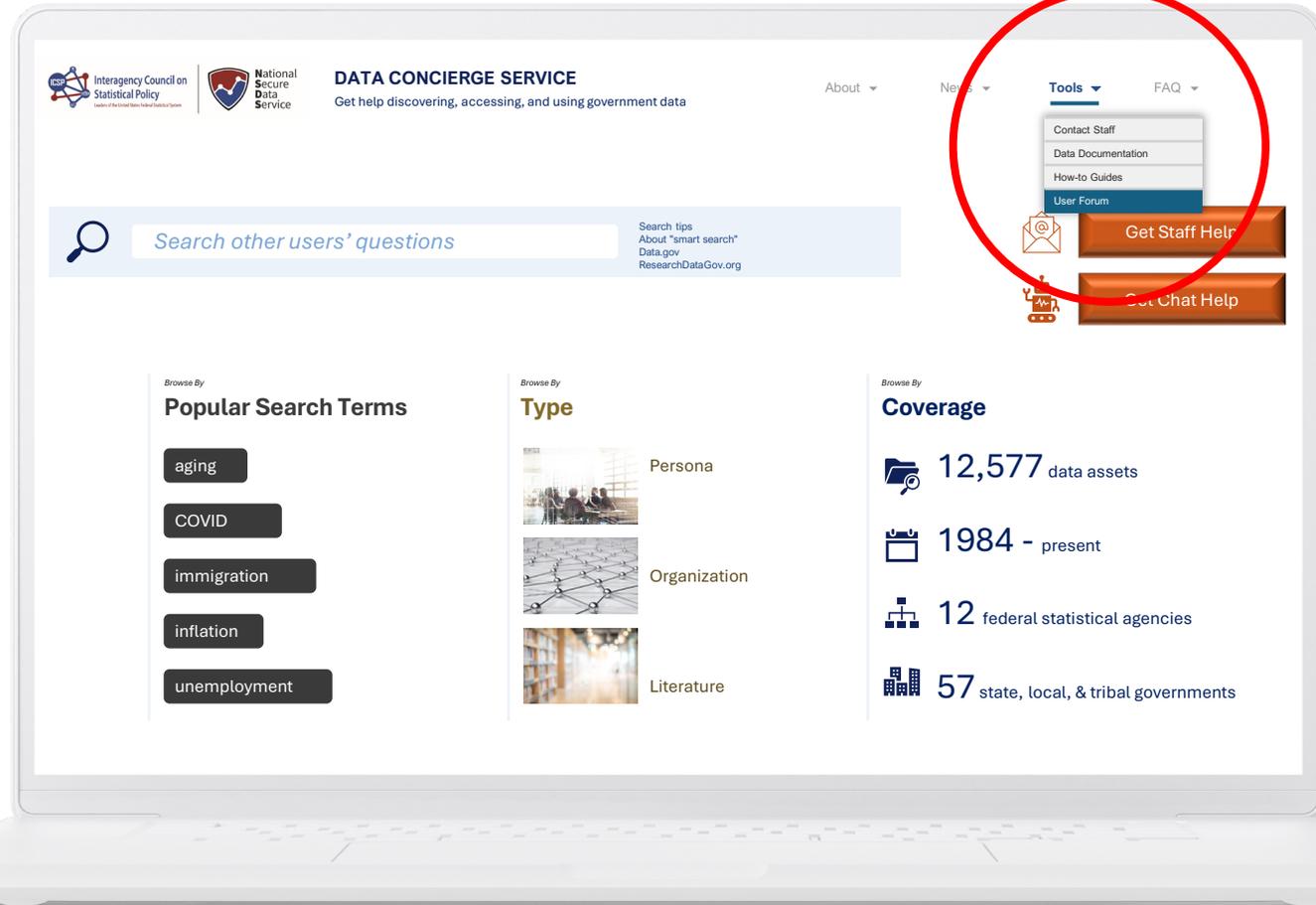
## 'I have a question about data'

→ The user enters the User Forum.

Next →



This is a novice user with a general question who doesn't know how to start looking for data. They are interested in learning how others have worked with data. Click on the Next and Back buttons to follow their user journey.



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# Personas : **Discover**

## 'I have a question about data'

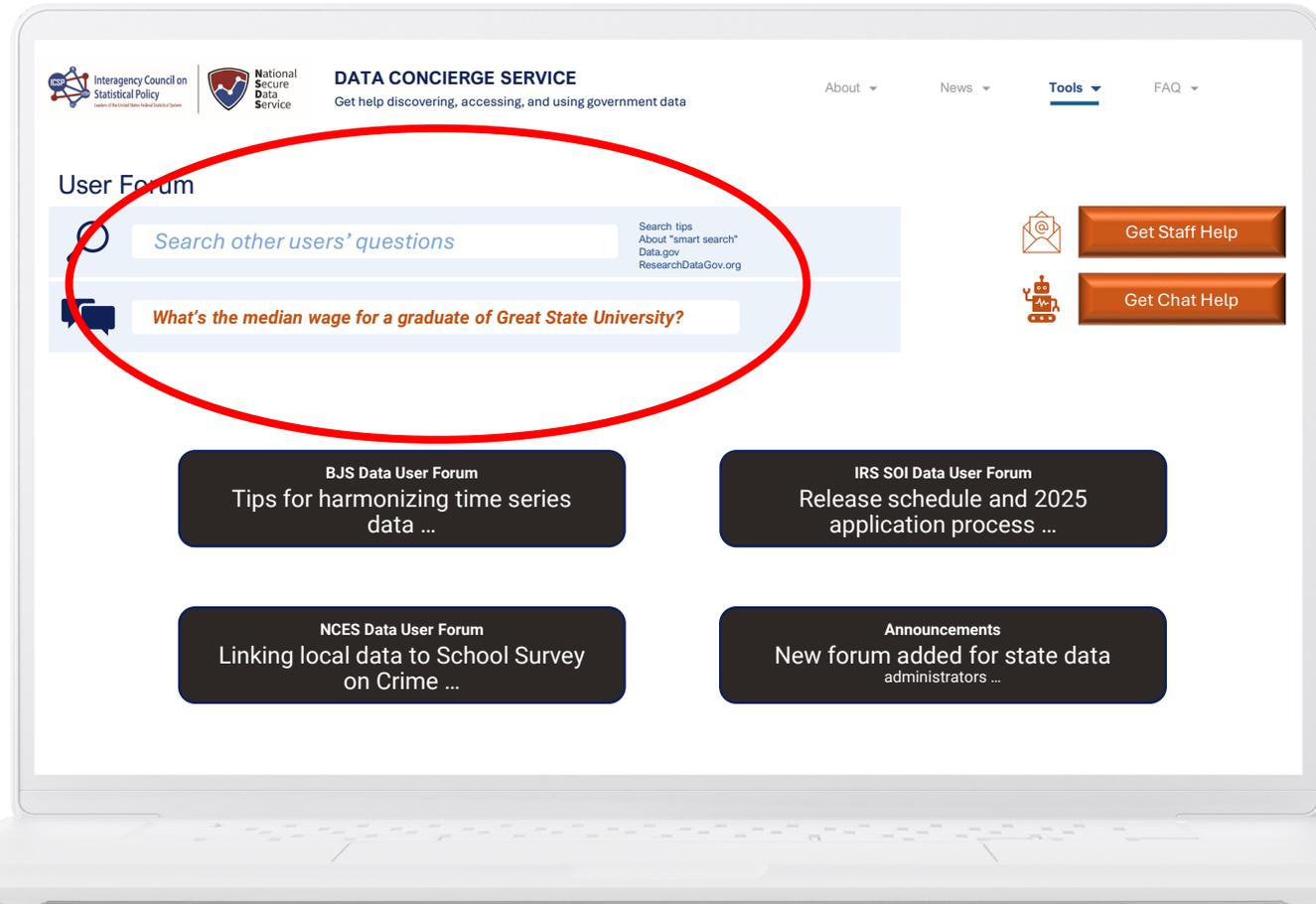
- The user enters the User Forum.
- After reviewing previous questions and curated conversations within the user forum, and not finding helpful content, the user decides to post their question. This initiates the feedback form that allows a user to enter information about their need.

← Back

Next →



This is a novice user with a general question who doesn't know how to start looking for data. They are interested in learning how others have worked with data. Click on the Next and Back buttons to follow their user journey.



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# Personas : **Discover**

## 'I have a question about data'

- The user enters the User Forum.
- After reviewing previous questions and curated conversations within the user forum, and not finding helpful content, the user decides to post their question. This initiates the feedback form that allows a user to enter information about their need.
- The post is entered and other users, along with agency staff, can view and reply to the post. Here we see the original user's question alongside a related user question later entered as a reply. DCS staff review user questions and respond on a recurring basis.

← Back

Next →



This is a novice user with a general question who doesn't know how to start looking for data. They are interested in learning how others have worked with data. *Click on the Next and Back buttons to follow their user journey.*

The screenshot shows the 'DATA CONCIERGE SERVICE' website. The header includes logos for the Interagency Council on Statistical Policy and the National Secure Data Service, along with navigation links for 'About', 'News', 'Tools', and 'FAQ'. The main content area is titled 'User Forum' and features a search bar with the placeholder text 'Search other users' questions'. Below the search bar, there is a question: 'What's the median wage for a graduate of Great State University?'. To the right of the search bar and question are two orange buttons: 'Get Staff Help' and 'Get Chat Help'. Below the question, there is an 'Example question' section with a user profile icon for the 'Montana Office of Public Instruction' and the text: 'I'm looking for information about employment outcomes post-grad for specific universities. I'm familiar with U.S. News and World Report ratings but need data about Montana students.' The date 'Jun 28, 2025' is displayed below the question, along with three action buttons: 'Reply to this question', 'Follow this question', and 'Moderate this thread'.

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# Personas : Discover

## 'I have a question about data'

- The user enters the User Forum.
- After reviewing previous questions and curated conversations within the user forum, and not finding helpful content, the user decides to post their question. This initiates the feedback form that allows a user to enter information about their need.
- The post is entered and other users, along with agency staff, can view and reply to the post. Here we see the original user's question alongside a related user question later entered as a reply. DCS staff review user questions and respond on a recurring basis.
- Several days later, a response is posted from agency staff. The user who posted the question receives a notification by email. Over time, users' questions are curated into collections and are used to develop additional guides and materials to support user data discovery, access, and use.

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This is a novice user with a general question who doesn't know how to start looking for data. They are interested in learning how others have worked with data. Click on the Next and Back buttons to follow their user journey.

The screenshot shows the 'DATA CONCIERGE SERVICE' website. The header includes logos for the Interagency Council on Statistical Policy and the National Secure Data Service, along with navigation links for 'About', 'News', 'Tools', and 'FAQ'. The main content area is titled 'User Forum' and features a search bar with the placeholder text 'Search other users' questions'. Below the search bar, there is a question: 'What's the median wage for a graduate of Great State University?'. To the right of the search bar are two orange buttons: 'Get Staff Help' and 'Get Chat Help'. Below the question, there is an 'Example question' section with a user profile icon for 'Montana Office of Public Instruction' and the text: 'I'm looking for information about employment outcomes post-grad for specific universities. I'm familiar with U.S. News and World Report ratings but need data about Montana students.' Below the question are three buttons: 'Reply to this question', 'Follow this question', and 'Moderate this thread'. The 'Answers' section shows a response from the 'National Center for Education Statistics' dated 'Jul 3, 2025' with 13 likes.

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# Personas : **Access**

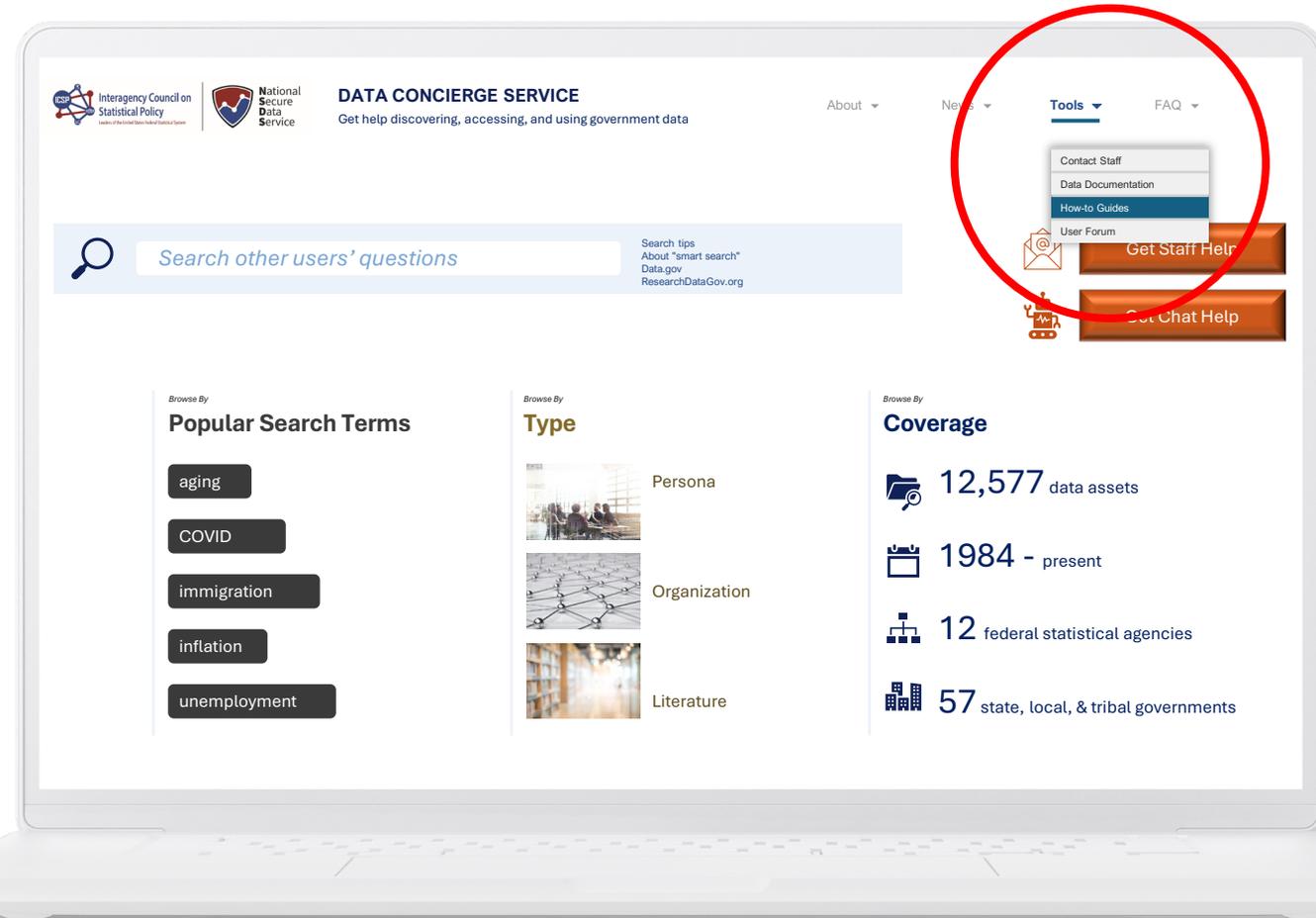
“I'd like to access an existing dataset”

→ The user enters the How-to Guides.



This is an intermediate user who is aware of the data they want to access but is unfamiliar with navigating restricted data access. Click on the Next and Back buttons to follow their user journey.

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# Personas : **Access**

## “I’d like to access an existing dataset”

→ The user enters the How-to Guides.

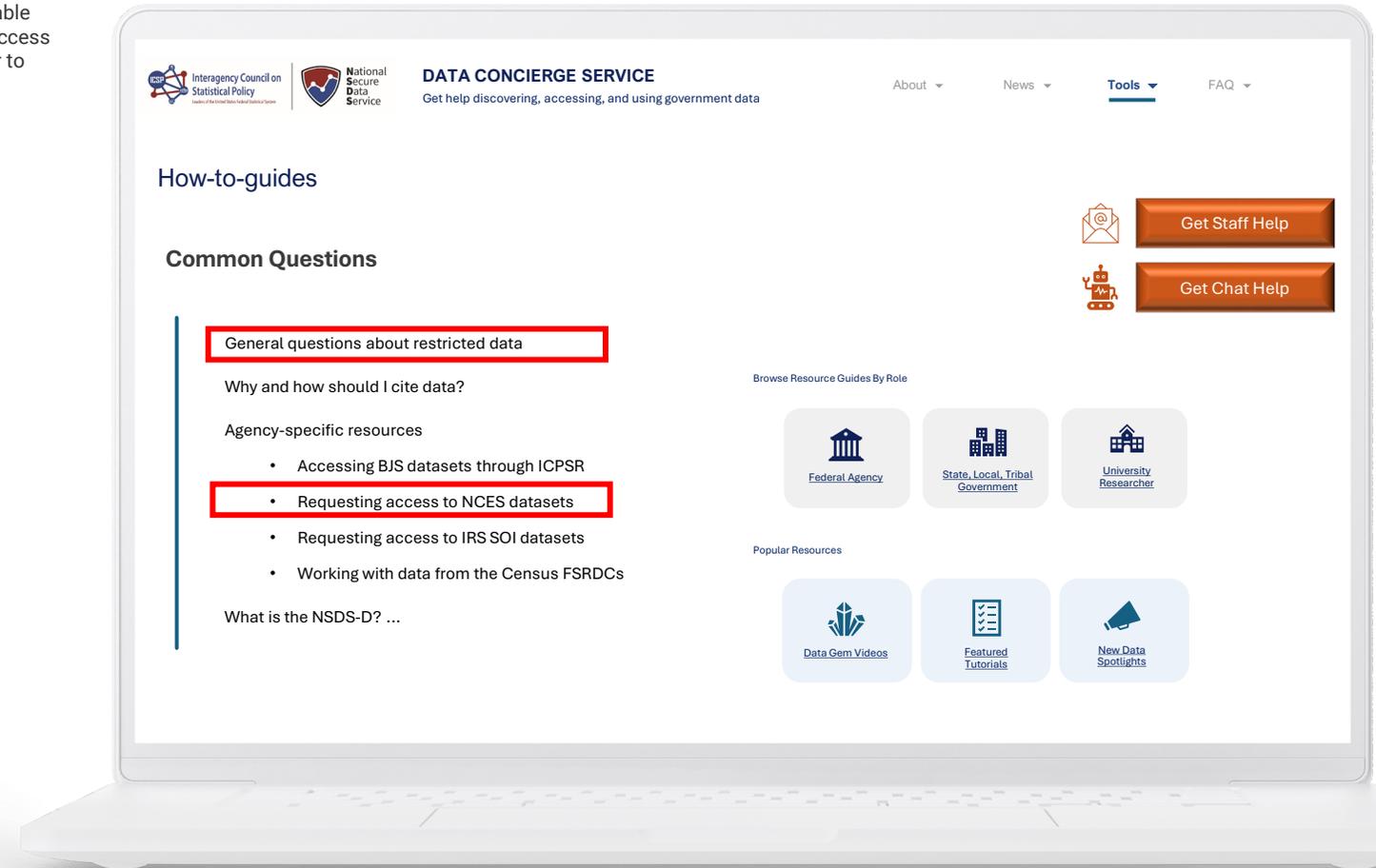
→ The user reviews existing documentation (common questions, resource guides, popular resources) available through How-to Guides to learn more about how to access restricted data assets but is unable to find an answer to their specific question.

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Next →



This is an intermediate user who is aware of the data they want to access but is unfamiliar with navigating restricted data access. Click on the Next and Back buttons to follow their user journey.



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# Personas : **Access**

## “I’d like to access an existing dataset” ’

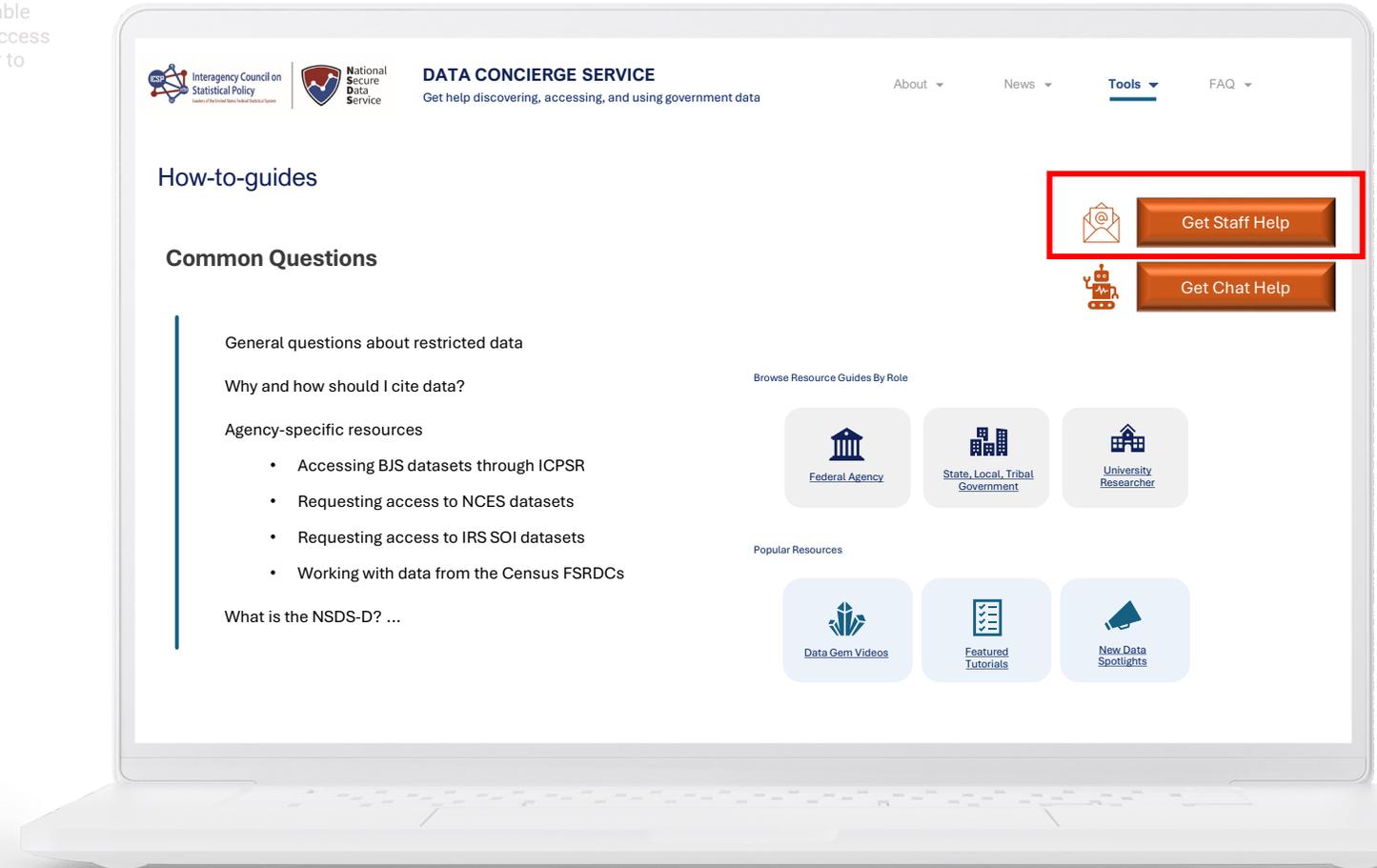
- The user enters the How-to Guides.
- The user reviews existing documentation (common questions, resource guides, popular resources) available through How-to Guides to learn more about how to access restricted data assets but is unable to find an answer to their specific question.
- The user then initiates a request for Staff Help.

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This is an intermediate user who is aware of the data they want to access but is unfamiliar with navigating restricted data access. Click on the Next and Back buttons to follow their user journey.



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# Personas : **Access**

## “I’d like to access an existing dataset” ’

- The user enters the How-to Guides.
- The user reviews existing documentation (common questions, resource guides, popular resources) available through How-to Guides to learn more about how to access restricted data assets but is unable to find an answer to their specific question.
- The user then initiates a request for Staff Help.
- The user sees a pop-up web form. They enter the information they need along with their email address to submit a ticket.

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Next →



This is an intermediate user who is aware of the data they want to access but is unfamiliar with navigating restricted data access. Click on the Next and Back buttons to follow their user journey.

The screenshot displays the 'DATA CONCIERGE SERVICE' website. The page header includes logos for the Interagency Council on Statistical Policy and the National Secure Data Service, along with navigation links for 'About', 'News', 'Tools', and 'FAQ'. The main content area is titled 'How-to-guides' and 'Common Questions'. A pop-up form is overlaid on the page, containing the following text and fields:

- Header: "Please describe your data need."
- Text input field: "I want to access data from NCES on crime and safety."
- Section: "List similar data sources." with a text input field containing "School Survey on Crime and Safety".
- Section: "Why weren't the FAQ sources you reviewed useful?" with a text input field containing "I found FAQs about NCES data, but the guide doesn't mention the data asset I want to use."
- Section: "Enter your email address for confirmation." with a text input field containing "User-123@yahoo.com".
- Submit button: "Submit" with a subtext: "You will receive a response within 72 hours".

On the right side of the pop-up, there are two orange buttons: "Get Staff Help" and "Get Chat Help". Below the pop-up, there are icons for "University Researcher" and "New Data Spotlights".

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# Personas : **Access**

## “I'd like to access an existing dataset”

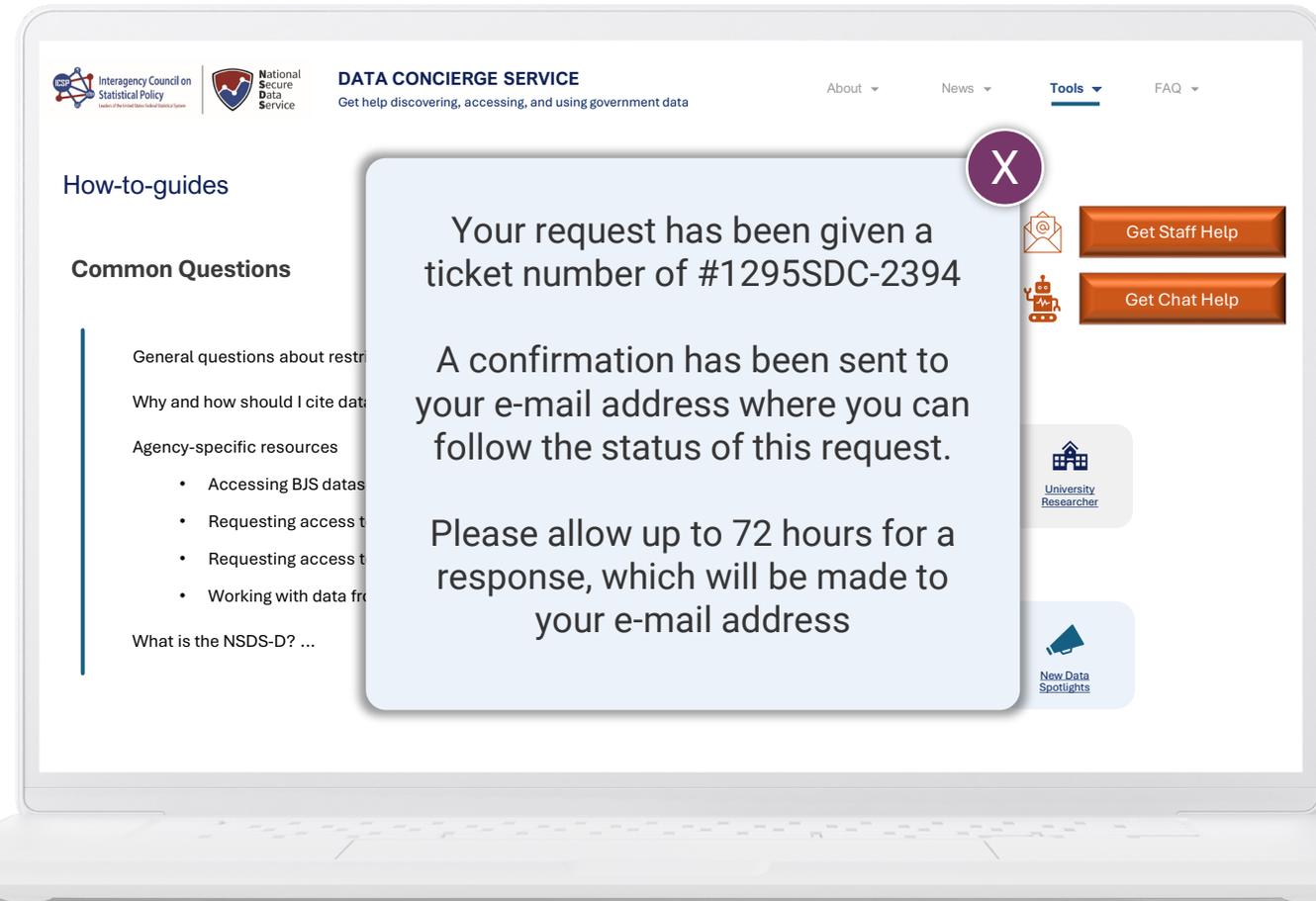
- The user enters the How-to Guides.
- The user reviews existing documentation (common questions, resource guides, popular resources) available through How-to Guides to learn more about how to access restricted data assets but is unable to find an answer to their specific question.
- The user then initiates a request for Staff Help.
- The user sees a pop-up web form. They enter the information they need along with their email address to submit a ticket.
- The user sees a popup window indicating that their request has been received. They also receive an email confirmation.

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This is an intermediate user who is aware of the data they want to access but is unfamiliar with navigating restricted data access. Click on the Next and Back buttons to follow their user journey.



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# Personas : **Access**

## “I'd like to access an existing dataset”

- The user enters the How-to Guides.
- The user reviews existing documentation (common questions, resource guides, popular resources) available through How-to Guides to learn more about how to access restricted data assets but is unable to find an answer to their specific question.
- The user then initiates a request for Staff Help.
- The user sees a pop-up web form. They enter the information they need along with their email address to submit a ticket.
- The user sees a popup window indicating that their request has been received. They also receive an email confirmation.
- The user receives a reply to their inquiry within 72 hours via email using the original ticketing system. The reply is also used to augment the common questions materials under the responsible agency. Users' inquiries can also inform the development of featured content, such as tutorials explaining how to apply for access to data.

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This is an intermediate user who is aware of the data they want to access but is unfamiliar with navigating restricted data access. Click on the Next and Back buttons to follow their user journey.

The screenshot displays the 'DATA CONCIERGE SERVICE' website. At the top, there are logos for the Interagency Council on Statistical Policy and the National Secure Data Service, along with the service name and tagline: 'Get help discovering, accessing, and using government data'. Navigation links for 'About', 'News', 'Tools', and 'FAQ' are visible. The main content area is titled 'How-to-guides' and 'Common Questions'. Under 'Common Questions', a list of links is shown, with 'Requesting access to NCES datasets on crime and safety' highlighted by a red box. To the right, there are buttons for 'Get Staff Help' and 'Get Chat Help'. Below the list, there are sections for 'Browse Resource Guides By Role' (Federal Agency, State, Local, Tribal Government, University Researcher) and 'Popular Resources' (Data Gem Videos, Featured Tutorials, New Data Spotlights).

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# Personas : Use

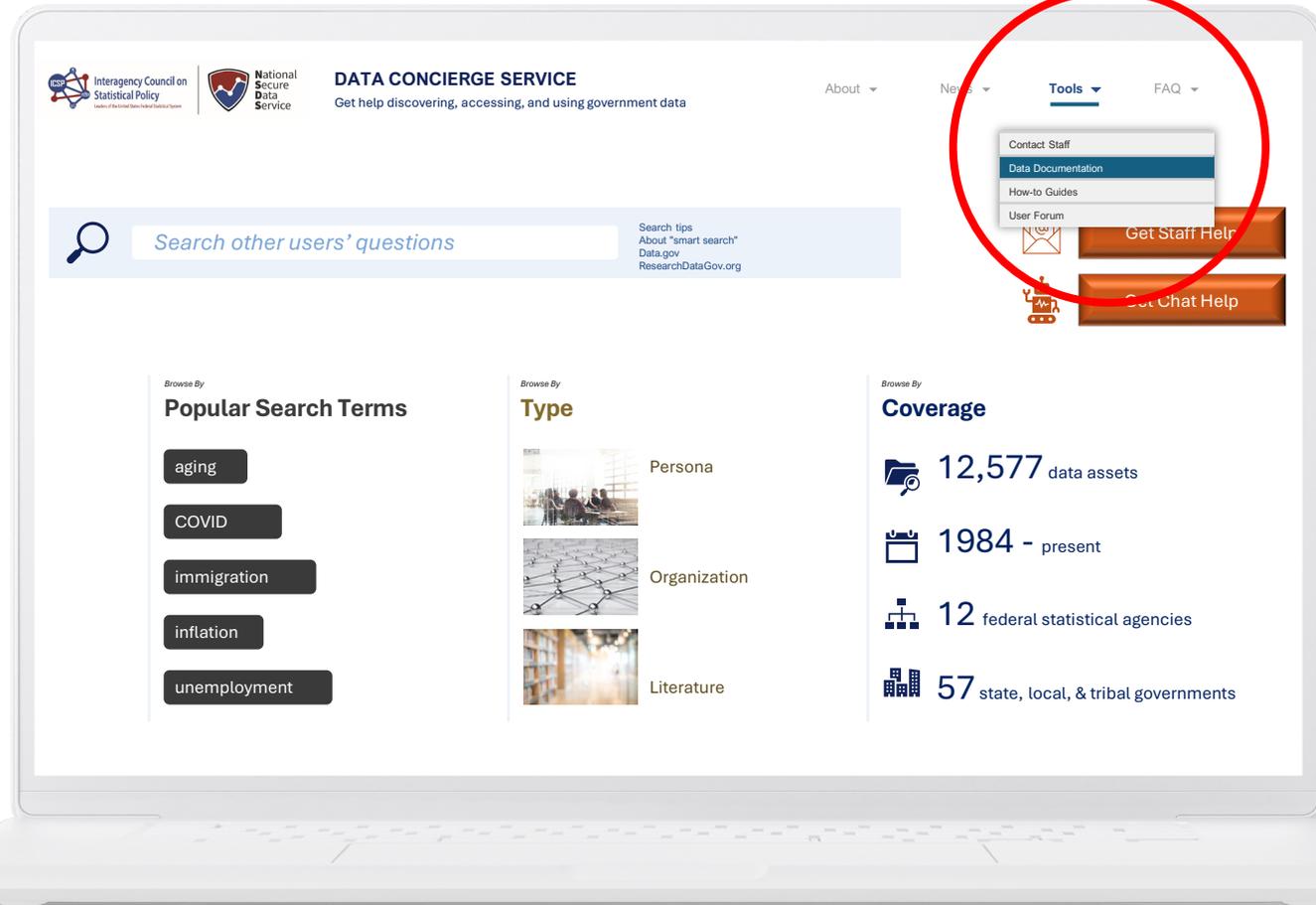
“I need to create a new data asset by linking multiple datasets.”

→ The user enters the Data Documentation.

Next →



This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.



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# Personas : Use

“I need to create a new data asset by linking multiple datasets.”

→ The user enters the Data Documentation.

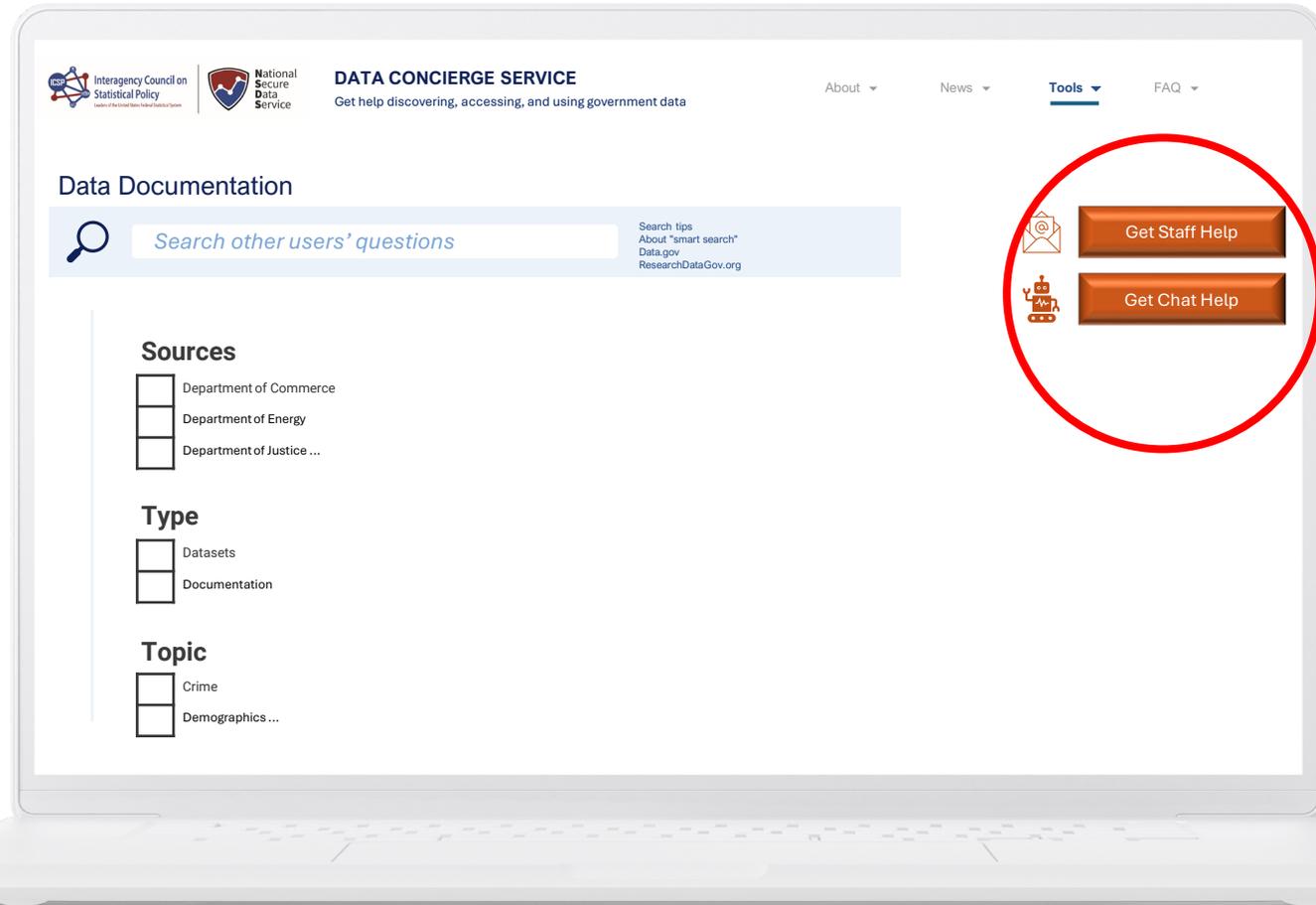
→ The user initiates search through the chatbot by selecting Get Chat Help from the Data Documentation Tool page.

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This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.



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# Personas : Use

“I need to create a new data asset by linking multiple datasets.”

- The user enters the Data Documentation.
- The user initiates search through the chatbot by selecting Get Chat Help from the Data Documentation Tool page.
- This opens a chatbot popup where the user can enter their question in plain language. The chatbot will perform semantic matching, possibly on variables, to help the user identify relevant data for their use case. The chatbot populates the search results on the page where the user can explore each dataset in more depth.

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This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.

The screenshot displays the 'DATA CONCIERGE SERVICE' website. The header includes logos for the Interagency Council on Statistical Policy and the National Secure Data Service, along with navigation links for 'About', 'News', 'Tools', and 'FAQ'. The main content area is titled 'Data Documentation' and features a search bar with the placeholder text 'Search other users' questions'. To the right of the search bar are search tips and two orange buttons: 'Get Staff Help' and 'Get Chat Help'. Below the search bar, there are three filter sections: 'Sources' (with options for Department of Commerce, Department of Energy, and Department of Justice), 'Type' (with options for Datasets and Documentation), and 'Topic' (with options for Crime and Demographics). A chatbot popup is visible on the right side of the screen, containing the text: 'I'm here to help you search for data. What would you like to do?' and a highlighted search result: 'Find datasets with populations that include U.S. farmers and veterans'. Below the popup, it says 'I've searched data documentation and found these datasets...'.

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“I need to create a new data asset by linking multiple datasets.”

- The user enters the Data Documentation.
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- After reviewing documentation for the search results, the user determines that two distinct datasets from different sources will be useful for their analysis. They determine that they will need to link these datasets, but they are not familiar with the process or permissions needed to perform linkage.

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This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.

The screenshot shows the 'DATA CONCIERGE SERVICE' website. The page title is 'Data Documentation'. There is a search bar with the placeholder text 'Search other users' questions'. To the right of the search bar are links for 'Search tips', 'About "smart search"', 'Data.gov', and 'ResearchDataGov.org'. On the right side of the page, there are two orange buttons: 'Get Staff Help' and 'Get Chat Help'. The main content area displays search results under the heading '47 datasets found'. There are three filter sections on the left: 'Sources' (with checkboxes for Department of Commerce, Department of Energy, and Department of Justice...), 'Type' (with checkboxes for Datasets and Documentation), and 'Topic' (with checkboxes for Crime and Demographics...). The search results list several datasets, with two highlighted by red boxes: 'VA Pension Recipients as a Percentage of Veteran Population by State for Fiscal Years: 2019, 2020, 2021, and 2023' and '2022 Census of Agriculture'.

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- After reviewing documentation for the search results, the user determines that two distinct datasets from different sources will be useful for their analysis. They determine that they will need to link these datasets, but they are not familiar with the process or permissions needed to perform linkage.
- The user proceeds to contact staff who can help provide guidance about the technical and licensing requirements for linking the data assets from different agencies. The user selects the Contact Staff tool from the Tools dropdown menu.

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This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.

The screenshot displays the 'DATA CONCIERGE SERVICE' website. The page title is 'Data Documentation'. A search bar contains the text 'Search other users' questions'. Below the search bar, there are filters for 'Sources', 'Type', and 'Topic'. The 'Sources' filter shows three options: 'Department of Commerce', 'Department of Energy', and 'Department of Justice...'. The 'Type' filter shows two options: 'Datasets' and 'Documentation'. The 'Topic' filter shows two options: 'Crime' and 'Demographics...'. The main content area displays '47 datasets found' and lists several datasets with their titles and descriptions. A red circle highlights the 'Tools' dropdown menu in the top right corner, which is open and shows options: 'Contact Staff', 'Data Documentation', 'How-to Guides', and 'User Forum'. Below the dropdown are two buttons: 'Get Staff Help' and 'Get Chat Help'.

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- After reviewing documentation for the search results, the user determines that two distinct datasets from different sources will be useful for their analysis. They determine that they will need to link these datasets, but they are not familiar with the process or permissions needed to perform linkage.
- The user proceeds to contact staff who can help provide guidance about the technical and licensing requirements for linking the data assets from different agencies. The user selects the Contact Staff tool from the Tools dropdown menu.
- The user is taken to the Contact Staff Tool page. They will be able to identify relevant agency contacts from lists, organization charts, or other curated contact lists. They can initiate a request to contact staff for support through a ticket (Get Staff Help) or through a chat session (instant feedback). The user reviews the organization chart outlining DCS contacts and then selects “Get Staff Help”. This opens a form where the user enters relevant information, identifies their need, and submits the Contact Staff ticket.



This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.

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- After reviewing documentation for the search results, the user determines that two distinct datasets from different sources will be useful for their analysis. They determine that they will need to link these datasets, but they are not familiar with the process or permissions needed to perform linkage.
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- The user is taken to the Contact Staff Tool page. They will be able to identify relevant agency contacts from lists, organization charts, or other curated contact lists. They can initiate a request to contact staff for support through a ticket (Get Staff Help) or through a chat session (instant feedback). The user reviews the organization chart outlining DCS contacts and then selects “Get Staff Help”. This opens a form where the user enters relevant information, identifies their need, and submits the Contact Staff ticket.
- The user receives a ticket via email. The contact staff then follows up with the user to provide relevant resources, such as guides to record linkage, recommends relevant tools, and computing resources, and logs this interaction in the ticket.



This is an advanced user who is aware of useful data. However, the user needs guidance linking data for their use case and wants to contact staff for help. Click on the Next and Back buttons to follow their user journey.

The screenshot shows the 'DATA CONCIERGE SERVICE' website. The page title is 'Staff Contact'. On the right side, there are navigation links for 'About', 'News', 'Tools', and 'FAQ'. A large blue confirmation message is overlaid on the page, stating: 'Your request has been given a ticket number of #5244LQA-8851. A confirmation has been sent to your e-mail address where you can follow the status of this request. Please allow up to 72 hours for a response, which will be made to your e-mail address'. Below the message, there are two orange buttons: 'Get Staff Help' and 'Get Chat Help'. The background of the page shows an organization chart with several staff members listed, including Olive Chelangat, Robert Clark, John Foster, Ross Bonner, Dylan B, Jim Richter, Katherine, Janice Goodacre, and Hector.

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# Personas : **Explore**

## “What is the status of user requests?”

→ Authenticated users (agency or DCS staff) have access to the back-end **ticketing system**. This view shows the tickets and provides an interface into the types of issues that are logged. Assignees who handle the tickets are also logged, to help track workload and staffing hours.

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This user is a DCS staff member with subject expertise who provides customer support. They are concerned with understanding how site visitors are using services and want to identify improvements to those services. *Click on the Next and Back buttons to follow their user journey.*

The screenshot displays the 'DATA CONCIERGE SERVICE' dashboard. At the top, there are navigation links for 'About', 'News', 'Tools', and 'FAQ'. Below the navigation is a summary section with four cards: 'New Tickets Today' (10), 'Tickets Closed Today' (8), 'Open Tickets' (25), and 'Unassigned Tickets' (6). The main content area features a 'Create Ticket' button and a search bar with the placeholder text 'Enter a user's name to begin ticket creation'. Below the search bar is a table of tickets with columns for Ticket #, Username, Subject, Request Category, Status, Assigned?, Time Created, and Last Updated. To the right of the table is a 'Request Categories' chart showing a donut chart with four segments: Referral (dark blue), Discovery (orange), Access (green), and Use (light blue). The chart is labeled 'YTD' and 'Active Tickets'.

Ticket #	Username	Subject	Request Category	Status	Assigned?	Time Created	Last Updated
18518	Anya Petrova	I want to access data from NCE5 on crime and safety	Data Access	Active	Pending	2025-02-25	2025-02-28
11357	Jasper Finch	What's the median wage for a graduate of Great State Univers ..	Data Discovery	Active	C Hoxberg	2025-02-28	2025-03-04
10751	Fatima Silva	I've identified datasets from the VA and USDA, and I need sup ..	Data Linkage	Closed	NA	2025-02-28	2025-03-03
17316	Clara Beaumont	Trying to figure out if I analyzed data on unemployment insu ..	SME Referral	Active	Pending	2025-02-24	2025-02-28
18220	Malcolm Rivers	Is there any code available from analysis of federal TANF da ..		Active	C Hoxberg	2025-02-26	2025-02-26
11953	Genevieve Sterling	Is there data on the number of car crashes with pedestrians ..	Data Discovery	Active	E Goldin	2025-02-22	2025-02-25
17215	Kenji Tanaka	I don't really understand what "small area estimation" is. A ..	SME Referral	Active	E Goldin	2025-02-22	2025-02-26
13684	Javier Rodriguez	Is there any data on other countries in North America for fa ..	Data Discovery	Closed	-	2025-02-21	2025-02-25
18106	Nia Adebayo	How far back does data go back on marital status? And how ge ..	Data Discovery	Active	J Abrams	2025-02-17	2025-02-21
11707	Rohan Chatterje	I want to link data on eviction court records and household ..	Data Access	Closed	-	2025-02-21	2025-02-21
13591	Isabella Rossi	Where can I figure out all sources of data on early educatio ..	Data Discovery	Closed	-	2025-02-21	2025-02-21
12322	Omar Hassan	Is there a list somewhere of other people doing research on ..		Closed	-	2025-02-20	2025-02-23

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# Personas : Explore

## “What is the status of user requests?”

- Authenticated users (agency or DCS staff) have access to the back-end **ticketing system**. This view shows the tickets and provides an interface into the types of issues that are logged. Assignees who handle the tickets are also logged, to help track workload and staffing hours.
- Authenticated users (agency or DCS staff) also have access to a back-end **metrics tracking dashboard**. This view shows the engagement with different services that the DCS provides and is enabled by web analytics rather than the ticketing system. This provides insights into which tools and services are most heavily used, helping allocate appropriate levels of resources, or promote more engagement with underutilized tools and services.

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This user is a DCS staff member with subject expertise who provides customer support. They are concerned with understanding how site visitors are using services and want to identify improvements to those services. *Click on the Next and Back buttons to follow their user journey.*



Thank you.

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