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1 Introducing the Data Cookbook

Your organization has reporting needs – but what information needs to be reported, exactly? How is it calculated and displayed? And where is that information stored in your system or systems?

All too often, when a report is requested, the report requirements leave too much room for interpretation. Room for interpretation means room for misunderstanding, error, and frustration.

The Data Cookbook exists to help you and your colleagues effectively and efficiently create report specifications with all the right details so that your reports can be built right the first time.

1.1 How Does It Work?
The Data Cookbook provides a central location for you and your colleagues to organize and store report designs (“specifications”) and the definitions those reports are built upon.

What makes this tool so powerful is its ability to help you collectively discuss, define, and approve a single definition for each of your report’s elements so that there is no confusion about what is meant when someone refers to an approved definition.

This means that after you determine that you need to design a report that includes “Graduation Rate,” for example, you no longer have to find out what is meant by “Graduation Rate.” The definition is already defined and ready to be included in a specification.

1.2 How Do I Get Started?
The rest of this document exists to provide an introduction to the functionality of the Data Cookbook. Follow along from start to finish for a full overview, or skip to the section that most interests you.

1.3 Accessing the Data Cookbook
The Data Cookbook is delivered as Software-as-a-Service (SaaS). You access it using a web browser. The URL is typically something like yourschool.datacookbook.com, but your Data Cookbook administrator can provide you with the exact web address. Note that the www prefix typically used in web addresses is not used here.

You can log in the Data Cookbook directly using the credentials e-mailed to you, or you can use your institution’s network authentication if your administrator has configured the Data Cookbook!!

www.datacookbook.com
Cookbook to do so. In that case your username (and password, if required) should be the same as those you use to access other applications.

1.4 *Maintaining Your Data Cookbook User Information*
Your personal information and user settings in the Data Cookbook are maintained on a single page accessed by clicking your name (located in the upper portion of the page, near the center of the screen). Use this page to maintain your:

- Name
- Email address
- Time zone
- Password (if your organization is not using external authentication)
- Email notification preferences
- Job title
- Contact information

To edit the information and settings, click the Edit Profile / Change Password link.

1.5 *Email Notification Preferences*
The Data Cookbook can be configured to send you an email when action is required from you, or when something you are watching, such as new posts in forums, has been updated.

Use your email notification preferences to set the frequency of notification that you want for your Data Cookbook account. When you view your user profile, you will also see the next time the Data Cookbook will search for new notifications to send you.

Note: no matter what e-mail checking frequency you choose, you will only receive a message when an action has been assigned to you or when something you watch has been changed.
User Profile

Profile

Name: Reggie Stration

E-mail: sflory+rstrat@idatainc.com

Time Zone: Eastern Time (US & Canada) (inherited from your institution)

EMAIL FREQUENCY

Definitions awaiting action from you  Immediate
Next processing time: 2:43 PM 28 Sep 2015

Updates to Definitions you are watching  Immediate
Next processing time: 2:43 PM 28 Sep 2015

Specifications awaiting action from you  Immediate
Next processing time: 2:43 PM 28 Sep 2015

Updates to Specifications you are watching  Immediate
Next processing time: 2:43 PM 28 Sep 2015

Updates to Information Requests  Immediate
Next processing time: 2:43 PM 28 Sep 2015

New posts in watched forums or topics  Immediate
Next processing time: 2:43 PM 28 Sep 2015

EDIT PROFILE / CHANGE PASSWORD
2 Navigation

When you log in to the Data Cookbook you will land on your home page. When you are a new user there won’t be much content there, but once you’ve been working for a while your home screen will show a fair amount of information. In the example below, Jill Yun is a report developer at IData University, and she has a lot to work on.

The search box at the top of the screen initiates the Information Request process, which is covered in the next chapter. The home screen also shows a To Do List, My Feed, and a variety of information about Cookbook activity. There are also links to create definitions and/or specifications, if you are a user who has the privileges to do so.
2.1 Getting Around in the Data Cookbook

The links across the top (Home, Definitions, Specifications, Organization, Community) are all drop-down links. Hovering over the links with your cursor will pop up a number of related links. Most users will be working in the Home, Definitions, and Specifications tabs.

2.2 How Is the Data Cookbook Organized?

The Data Cookbook consists of five tabs—Home, Definitions, Specification, Organization, and Community—each of which contains links to various pages.

Home
When you log in you will land on your home tab by default.

Definitions
Definitions are the basic building blocks of your reports and of the Data Cookbook. From this tab you can browse definitions, create a new definition, view the definitions waiting for approval, see a list of “missing” definitions, and more. For more information on working with definitions see Section 4.

Specifications
A specification is the term used by the Data Cookbook to encompass any reporting deliverable that you want to document. From this tab you can browse all your organization's specifications, create a new specification request, view specifications waiting for approval, and more. To learn more about specifications see Section 5.

Organization
Unless you are an administrator, nearly every link on the Organization tab will be read-only. However much of what is stored on this tab will be of interest to you and may affect your work directly, depending on your user role.

Functional Areas
Each definition (and specification) in the Data Cookbook must belong to at least one functional area. Functional areas are a way of categorizing definitions, and they are also critical to the definition creation and approval workflow. Functional areas should correspond to your organization's data governance structure, and in particular they require data stewards to be assigned.

Organization Roles
Work on specifications is directed by your organization role.

Community
Many schools, organizations, and vendors have shared some of their Data Cookbook content (definitions, specifications, and/or other files) with the Data Cookbook community. This is a public repository, where users can import definitions, or interested parties can browse. Some organizations are also part of what's known as private communities, which is an optional Data Cookbook feature that allows institutions to share more content with each other, and not necessarily with the public community.

2.3  User Roles
Your user role is made up of your functional area role(s) and your organizational role(s), and it affects what kind of work you are able to do in the Data Cookbook.

Note: Your user role has been set up by your Data Cookbook Administrator. Please contact your Data Cookbook Administrator if you require changes to your user role.
Functional Area Roles
For each functional area in the Data Cookbook, you have a role – viewer, editor, or moderator.

**Viewers**
Viewers can see content and post comments in definitions for the functional area, but cannot make or approve changes. All users are viewers by default.

**Editors**
Editors can create new definitions and in some cases make changes to existing definitions, but cannot approve changes. Editors can invite other editors (“content contributors”) to work on a definition as well.

**Moderators**
Moderators can act as editors, and in addition they can approve or reject definitions and even delete them if necessary.

Note: If the moderator has his or her notification status set to Never, he or she will not receive notifications about definitions in their functional area(s). The change request will still show up on the Home tab recent activity list.

For more information about Definitions, see section 4.

Organization Roles
Specifications and Information Requests do not belong to Functional Areas in the same way that definitions do, but rather they span the organization. Hence the roles for working with them are known as Organization Roles in the Data Cookbook:

**Specification Viewer**
Can see content and post comments for reports, but cannot make or approve changes. *Cannot* request specifications or specification changes. This is the default role for all users.

**Specification Requester**
Can request new specifications and changes to existing specification, but may not assign the work to another individual or work on a specification once it has been submitted to the specification queue. The requester is however the role that ultimately approves specifications.
**Specification Worker**
Has all the permissions of a requester and can make specification changes. Workers can assign an unassigned specification to an individual, including themselves.

**Specification Manager**
Has all the permissions of a worker and can cancel specification requests and reassign existing requests, including to themselves. When a change request is made without a user assigned to the change request, the manager(s) is notified. This ensures that the change request does not fall by the wayside.

**Information Request Manager**
Responsible for responding to requests for information, or assigning other users to those requests. In general manages the queue of information requests. As noted above, this functionality can be essentially turned off if no one is given information request manager permissions.
3 Information Request Workflow

3.1  Requesting Information
When you log in to the Data Cookbook you will see a search box on the home page:

You can quickly enter a phrase and hit “enter” to search. The results will appear in two columns, one for Definitions and one for Specifications that match. You will see brief information about each and clickable link to help you refine your search.

Find Data

Your search for “student gpa” produced these results:

<table>
<thead>
<tr>
<th>Definitions</th>
<th>Specifications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student Term GPA</strong></td>
<td><strong>Student Listing</strong></td>
</tr>
<tr>
<td>Synonyms: Semester GPA</td>
<td>Functional Areas: Student, Student Life</td>
</tr>
<tr>
<td>Functional Areas: Enrollment</td>
<td>Specification Type: Basic Report</td>
</tr>
<tr>
<td>Tags:</td>
<td>Data System:</td>
</tr>
<tr>
<td>Related Specifications: Student Term Detail</td>
<td>Tags:</td>
</tr>
<tr>
<td><strong>Major GPA</strong></td>
<td>Related Definitions:</td>
</tr>
<tr>
<td>Functional Areas: Student</td>
<td>Current Major, Current Name, Email Address,</td>
</tr>
<tr>
<td>Tags:</td>
<td>Full-Time Student, Grade Point Average, Mailing Address, Major GPA</td>
</tr>
<tr>
<td>Related Specifications: Student Listing</td>
<td></td>
</tr>
<tr>
<td><strong>Career GPA</strong></td>
<td><strong>Incoming Freshman Report</strong></td>
</tr>
<tr>
<td>Functional Areas: Enrollment</td>
<td>Pending Changes</td>
</tr>
<tr>
<td>Tags:</td>
<td>Functional Areas: Enrollment</td>
</tr>
<tr>
<td>Related Specifications: Student Term Detail</td>
<td>Specification Type: Basic Report</td>
</tr>
<tr>
<td></td>
<td>Data System: ERP Systems &gt; My ERP System</td>
</tr>
</tbody>
</table>

You can also click on Find Data from within the Home tab, which will take you to a screen that looks very similar.
If you don’t find what you’re looking for, or you don’t know how to run the search you want, you can click on the blue “Request Additional Help” button and then ask a question:

Provide additional details on your request for help
Siri will be with you shortly.

Now, that request goes into a new queue and alerts all the people assigned as Information Request Managers.

Note: your institution may not have any users designated as Information Request Managers, in which case the Information Request functionality will not work. Check with your Data Cookbook administrator to find out if Information Requests have been enabled.

3.2 Monitoring your Information Requests
You can always see a list of outstanding requests you have made from the Home tab. The first three will show, and if there are more you will be able to click the “See All” link.
The Data Cookbook will also notify you when someone has responded to your request.

Clicking on the “See All” link will bring you to a page where you can browse information requests. You can also navigate to this page by selecting “Information Requests” from the drop-down menu in your Home tab.

### Information Requests

#### Request #8: Open

**Requested by:** Guest User 18 days ago  
**Initial Search:** GPA  
**REQUEST:** Reviewing Request process

**Comments and Notes**

**Updated by:** Guest User 18 days ago  
**COMMENT:** TEST - Need a report with WIN, last name, first name, degree, major, student classification, overall GPA, GPA in major, enrolled student credit hours, student credit house in major, cumulative student credit hours

**Related Definitions**

- [Type or Select...](#)  
- [Relate](#)

**Related Specifications**

- [Type or Select...](#)  
- [Relate](#)

#### Request #7: Open

**Requested by:** Guest User 19 days ago  
**Initial Search:** GPA  
**REQUEST:** Need a report with Student GPA

**Assigned To:** Not Assigned  
**Current State:** Open

Create a specification for this request

### 3.3 Responding to Information Requests

Some users will be part of a user group that makes them Information Request Managers. (For more information on user groups, please see section 2, or consult the Admin Guide.) These users will be notified via e-mail when an information request is submitted, and they
will be responsible for helping the requester find information, or for assigning the request to another Cookbook user. This requests will also show up in To Do Lists on the Home screen.

Information Request Managers can take many steps when they work on an information request. They can request input from the requester, they can assign the request to another user, they can answer questions themselves, they can create a specification if one is necessary, and they can relate definitions and specifications to the request. Requesters can then look at the related objects and decide whether their question has been answered.

If you have been assigned an information request, you can ask the creator for additional input. (Information Request managers can also take this step at any time.)

In this example, John Admin has made an information request, and the request has been assigned to Stew Worker. Stew can ask John a question in the comment box and click on the Request Input button (highlighted); the request will then go back to John’s to-do list with a status of “Input Requested.” Stew can also add a comment without requesting input, for example if there is already an existing specification that meets John’s needs. Stew might also want to point out that there are a number of definitions regarding Student GPA, and that John should review them and decide which one he wants to use in his report.

Finally, either the person assigned this request is responsible for closing it. (An Information Request Manager can also close the request.) In the example below, the request has been assigned to Jill. Jill has decided to create a new specification and to close the request. So she has replied to everyone using the Comments and Notes box and she will click on the “Close” link (highlighted). Please refer to Chapter 5 for more information about the Specification workflow process.
Any user can review the Information Request queue and can add comments to any request.

Note that in this example our user has not been assigned this request and is not an Information Request Manager. He or she can still enter a comment or question in the box.

www.datacookbook.com
and click on “Add Comment.” And any commenter can also relate definitions and specifications to the request.

Note: if there is no user group set up with Information Request Manager privileges, then the Information Request functionality will not be enabled. No one will be notified when a request is submitted, and no one will be permitted to respond to a request.
4 Working with Definitions

A definition is a word or phrase representing a data element. A data element can be a field or group of concatenated fields in a database, it can be a derived field (such as an if/then statement), it can be a calculation like grade point average, it can be a management metric such as retention rate, and so forth.

In the Data Cookbook, a definition has a functional (or plain English) definition and can have at least one technical definition. You can also assign tags and synonyms to your definitions to help you locate and otherwise organize your definitions, but tags and synonyms are not required when you create definitions.

For example, here we see the approved definition Academic Program. Note that we see information about who created this definition, which version is active, a functional definition and a technical definition, a data system, a functional area, etc.
Name
All definitions have a name, which must be unique in your institution’s Data Cookbook. For example, only one definition can be called “Academic Program,” although you could also have a definition called “Active Academic Program” or “Previous Academic Program” or “Academic Program – Graduate.”

Functional Area
All definitions must belong to at least one functional area, and many may belong to several. Editors – people who create and modify definitions – and Moderators – people who create, edit, and approve definitions – must have privileges in a functional area to work on definitions in that area. Functional areas are unique to your organization, although they tend to congregate around common business functions such as Finance, Financial Aid, Admissions, etc. (For more information on the setup and organization of Functional Areas, consult the Admin Guide.)

Functional definition
This is the area where you enter the explanation, business rules and approved usage regarding a definition. Your institution will probably develop its own standards regarding the type and amount of information that comprises a functional definition. A general guideline is to make sure that a user from a different office in your organization can understand the functional definition without having any special knowledge of your business processes or data systems.

Technical definition
This is where the definition lives in your database, or the fields and factors involved in calculating it, or the statement/logic involved in extracting it from your data system. Definitions often have more than one technical definition. For example, there may be one for your ERP and another for your operational data store.

4.1 Definition Lifecycle
Definitions proceed through the Data Cookbook in the following lifecycle.

A definition is created and added to the Cookbook by an Editor or Moderator. As soon as a definition has been created and submitted for approval, it is assigned the status “Pending.” Moderators of the functional area(s) where a definition is created are notified by the Data Cookbook, via e-mail, that the new definition is waiting for them.

Definitions can also be saved as drafts, for example when you know the name of the definition but want to do additional research on functional or technical terminology. Draft
definitions have a status of “In Draft,” and the Data Cookbook does not notify moderators when new draft definitions are created.

**Definition Lifecycle**

When all the stakeholders agree on the functional and technical definitions of the definition, a moderator may approve the definition. At this stage, the definition status is “Approved.”

Note: any moderator for any functional area of which a pending definition is a part can approve the definition. Your institution may well have additional data stewardship policies outside the Data Cookbook.
4.2 How Do I Work with Definitions?

It’s easy to get started using definitions. Simply click the Definitions tab at the top of the page and you’re ready to get started.

From this section, you can launch into all the functionality available related to definitions. This functionality includes:

- Adding new definitions
- Searching for definitions
- Approving definitions
- Importing definitions from a file
- Looking at missing definitions
- Exporting definitions

Any user in the Data Cookbook can view and comment on definitions. To search for existing definitions, you can use the following methods:

- Enter a search term in the Search bar
- Filter the list of definitions using the Filters provided
• Browse through the list of all definitions

Note: browsing definitions will show a list of all definitions, approved and pending, at your institution. You will probably want to limit the list by using the search filters.

As noted above, only editors and moderators can create definitions. To add a new definition, click the Create a Definition link from the Definitions drop-down menu bar.

4.3 How Do I Moderate Definitions?
After a definition has been submitted, a functional area moderator is responsible for the next steps. She can edit the definition herself, she can request input, she can approve the definition version. In some cases she can reject the definition version.
To edit a definition, click on the blue Edit button. The Cookbook opens the definition in Edit Mode, and a user can make changes to the functional or technical definitions, add a definition source or classification code, or decide to share information about the definition with the Data Cookbook Community. (For more information about the Community, see Section 7 of this guide.)

To request input, click the grey Request Input button. Requests for input result in notifications back to the version creator and any content contributors, if they have been added. At this point the definition has a status of “Input Requested,” and is once again the responsibility of the definition editor(s). As soon as input is provided, the definition status returns to “Pending.”

You will have the opportunity to include a comment when you move a definition from one stage to another. This is particularly useful when submitting a definition to a moderator, or when a moderator is requesting input – you can provide information on why you chose to reject the definition or ask the definition creator to clarify a point, for example.

It is the responsibility of the Moderator to approve definition versions. At any point prior to approval the original definer, or anyone else identified as a content creator for the functional area where a proposed definition resides, may send definitions back to “In Draft” status to remove them temporarily from the approval queue. Also, even though a definition version may have been submitted, both version creators and content contributors can continue to edit the definition.

Note that in this example, the “Reject” option is unavailable. Only versions 2 and above can be rejected.

Batch Approval
You can approve definitions in bulk by going to the Definitions tab and clicking the Approval Queue link. If you are a moderator for a functional area with definitions in progress, a list of all definitions that require your approval appears.

(Definitions requiring your attention are also visible from your Home tab, as part of your to-do list. And the Data Cookbook will also send you e-mail when definitions are added to your to-do list.)

Note: if you are not a moderator you cannot approve definitions. If you are a moderator for a functional area with no definitions in progress, you will not see anything in the Approval Queue.

You can approve or reject definitions on this page by selecting definitions (use the checkbox next to each definition), choosing Approve or Reject at the bottom of the list, and clicking the Commit Selected button.
You can also review each definition in detail by clicking the definition name. If a definition has already been approved and you wish to review a new version, click on Pending Version or the Begin Approval button.
Doing so will take you to a view where definition details are displayed as well as the buttons that allow you to take action such Approve, Edit, Reject, and Request Input.

Note: This user clicked on Pending Changes, rather than Begin Approval, and so must take an extra step to see the changes between the current version and the most recently approved one. When viewing differences between versions, changes, additions, and deletions are all highlighted.

Functional definition:
A student enrolled in at least one course for at least one credit on or as of the census date in a degree-seeking program. Degree-seeking students who are enrolled for credits in non-degree programs must also be enrolled in a degree program credit to receive this status. Nonmatriculated students are not considered active, no matter how many credits they enroll for.

4.4 How Do I Invite Colleagues to Help?
Although one person will always be the Version Creator of a definition, additional users can be brought in as additional editors. These people are known as Content Contributors, and
can be added at any point in the definition lifecycle prior to approval (or rejection). For more information on definition versions, see below in this same section.

Generally content contributors are added because of their technical or subject matter expertise. They can be added by the version creator or the moderator. If, for instance, the original editor needs assistance with a technical definition, they might add a technical user as a content contributor. Or perhaps the original creator enters both a function and a technical definition and submits the definition to the moderator, but the moderator wants someone else to work on it prior to approving the definition.

In the example below, Jill is our version creator and Reggie is our functional area moderator. Either of them can add a content contributor from the drop-down list, as well as a note to that person. This note will show as a comment in the definition, and will also be e-mailed to the new content contributor.

Only users with edit permissions to the functional area(s) of the definition can be added as content contributors. Once a user is added as a content contributor, they essentially have the same privileges and responsibilities as the editor who created the definition version: they can edit, they can return a definition to draft, they can submit it for approval, and they will be notified when input is requested (and they can reply to that request).

4.5 How Do I Relate Definitions?
Some definitions are naturally related to each other. The Data Cookbook allows you to reflect this by relating the definitions within the Cookbook.

There are three ways to relate definitions:
1. While creating a definition, you can use double brackets [[ ]] to indicate the definition you are working on is related to the definition within the double brackets. The Data Cookbook will automatically link the definition you are defining to the definition if it already exists. If the definition does not already exist, a “stub” or blank definition page is automatically created for the definition you referenced. That blank definition page is linked to the definition you are defining. After you have finished defining the definition you are working on, you can go to the “stub” page for the definition you referenced and define that definition as well.

2. After writing the functional definition, but prior to submitting the definition for approval, click the box labeled “Scan for Matches.” This will cause the Cookbook to compare the words in the functional definition to definitions already in use at your institution. If the Cookbook finds matches, you will have the opportunity to relate them here.

3. After creating a definition, go to the definition page. Use the Relate to Definition box to type in the definition you want to relate to the definition you are viewing and click the Relate button.
When you relate a definition using the first method (using double brackets [[ ]] in the definition), the definition within the double brackets is automatically made a link to the definition that was related.

If you create several “stub” definition pages at once, you can use the Missing Definitions link under the Definitions tab to go directly to a list of “stub” definition pages.

Note: The third method of relating definitions only works if the definition you are relating already exists.

4.6 What is a Synonym? How Do I Use Tags?
Sometimes you may use two terms, words, or phrases to refer to the same concept. A common example is the use of an acronym such as GPA as well as a phrase, such as Grade Point Average. Creating a synonym allows users to search the Data Cookbook for a certain word or phrase but be directed to an official definition.

Tags are user-created ways to group or classify definitions and specifications.
4.7 Versions
Definitions have versions in the Data Cookbook. When a new definition is created and approved, the approved version becomes Version 1. This will be the version used when you and/or your colleagues relate the definition to a specification. (All changes to a new definition prior to approval, however, will be part of Version 1.)

Any subsequent changes to the definition will generate a new version. For example, your institution has an approved definition called Active Student. Active Student is currently at Version 1. You find out that the definition of an active student has changed, so you access Active Student in the Data Cookbook and edit the definition. When you update the definition, Version 2 of Active Student is automatically created.

The most recent approved version of a definition is used, for example when users add it to a specification, or when they click on a link from another definition. So even if you update a definition, the new version will not be put into use until it is approved within the Data Cookbook. Users can however see the version in progress once they view the latest approved one.

If necessary, a definition version can also be rejected. A version with the status “Rejected” is not deleted from the Data Cookbook; the Cookbook simply reverts to the most recent previously approved version for display, or inclusion in specifications, or sharing with the Community. Version 1 of a definition cannot be rejected, as there is no previously approved version to which to revert.

Note: Once a new version of a definition is approved, the new version is automatically used on any specifications the definition is related to. See the next section of this guide to learn more about how definitions and specifications work together.

4.8 How (and Why) Do I Make Definitions Public? How Do I Use Public Definitions?
When you create and edit definitions, you have the option to make definitions public. Public definitions are definitions your organization has chosen to share with the wider Data Cookbook community.

Note: When you make a definition public, only the functional definition is shared. Your technical definitions are not shared.

Shared definitions provide a resource for Data Cookbook community members when they wonder how other organizations are answering similar questions. For example, if you and your colleagues need to define “GPA” you can go the Community tab and search for the definition “GPA.” The Data Cookbook returns all of the definitions using “GPA” and their
functional definitions, giving you an easy way to see how other organizations define their definition “GPA.”

If you happen upon a public definition that meets a need at your organization, you may copy that definition to your own Data Cookbook definition library. The definition name and functional definition will be copied over – you will need to write the technical definition for the definition to meet your organization's needs. You can edit the functional definition as well, if your institution has slightly different practices from the community institution whose definition you are adapting.

There are two ways to copy definitions from the community: individually, or in bulk from an organization that has shared.

You are in no way obligated to share your definitions with the Data Cookbook community. For more information on the community, see Section 8.

If you do choose to share any of your definitions, it is easy to make them public. To make a definition public, select the “Share with the public?” checkbox on the Definition page.

Some institutions are members of private communities. Those institutions have the option to share definitions publicly, with the private community only, or both places. If your institution
is part of a private community you will see some additional options in the community section.

**4.9 Commenting on Definitions**

Any user in the Data Cookbook may comment on a definition. This is a good way for casual users, and people from outside a particular functional area, to ask questions and to make suggestions.

Also, as described above, whenever a definition changes status (such as when a Moderator requests input, or when an Editor submits a definition for approval, or when a definition is approved), the person making the change has the option to attach a comment.

Comments are associated with definition versions. When viewing a particular version, the comments for that version are visible at the bottom of the page; users must click on the Show/Hide link in order to expand other versions’ comments.

**4.10 Watching Definitions**

Whether or not you choose to comment on a definition, you may be interested in watching it over time. To watch a definition, simply click on the blue button that says “Watch this Definition for Changes.” You can choose to watch a definition within your organization’s instance of the Data Cookbook, or definitions that have been shared by other organizations. When changes are made to watched definitions, the Data Cookbook will send you a notification by e-mail.

Moderators and creators of definitions are considered watchers by virtue of creating or moderating it, and they too will get notifications about changes in state, even if other users are responsible for them.

You may decide you no longer want to watch a definition. There are two ways to stop watching: navigate to the definition in question and click on the “Stop” button:
You can also view a list of all the definitions you are watching by going to your user profile, and you can choose to stop watching them by clicking the “Stop Watching” button.

**4.11 Deleting Definitions and Comments**
Occasionally you may want to remove a definition from the Data Cookbook altogether. This privilege is reserved for moderators. Deleting a definition deletes all versions of a definition, as well as any comments on any of those versions. Moderators can also delete individual comments from a definition version.

Note: you cannot delete a definition if it is related to a specification. You must first remove the definition from the specification, if there are no approved versions of the specification. Otherwise this a situation best left to your administrator.
5 Working with Specifications

In the Data Cookbook, report designs and information about reporting deliverables are stored as Specifications. In many cases, a specification will be identical to a report design, but specifications can also include a variety of deliverables, such as dashboards or extracts, as well as database views, tables in an operational data store, fact tables in a warehouse, a layer or data block in a reporting environment, and so on.

During the process of creating a specification, you'll relate definitions to it and use the Data Cookbook to indicate how (or if) those definitions will appear. Requests to total, group, and sort are all easily handled by the Data Cookbook. You can also indicate how to filter (specify selection criteria) for the deliverable you are designing.

When you've finished, you'll have a complete report specification ready to turn over to your developers for creation. Or, if you build the specification at the same time as you develop your reporting deliverable, you will have it documented in the Data Cookbook for other users, future developers, and others who need to reference it.

Many organizations use a Data Cookbook API to pass specification content to their reporting tools. For more information on APIs, see Section 8.
Specifications go through the following lifecycle in the Data Cookbook:

1. A new specification is created. In the Data Cookbook users must have a reporting role of Requester, Worker, or Manager to create specifications.
2. Details of the new report request are laid out and submitted. A specification worker or manager has the option to assign the specification to themselves. Specification requesters choose “Submit Request Now” or “Submit Request Later.”
   a. Submit Request Now will send the specification request to the Specification Manager, who will review it and assign it to a Specification Worker, who will probably be a report writer, a business analyst, or a developer at your
institution. That person will work with the requester to identify the needed definitions and to add additional information to the specification. Specification requests at this stage are considered “In Progress.”

b. Submit Request Later allows the requester to provide more details regarding the specification. He or she can add definitions, choose a data system, build selection criteria, provide details about display options, and even upload additional design or content documents. These specifications are “Pending” until this user submits their request to the Specification Queue, where once again a manager will review it and assign to a worker.

3. The report design is developed within the Data Cookbook until the specification is approved by all stakeholders. During this phase, information can be requested from the Requester through the Data Cookbook. When information is requested from the Requester, the status is changed to Input Requested. When the Requester responds, the status is returned to In Progress.

4. Additional people can be brought into the specification workflow. The original requester can be replaced through a process known as delegation so that a new user is responsible for final approval. Work on the specification can be reassigned to other specification workers or managers.

5. After the details of the specification have been determined, the specification is submitted to the approver. The status is changed to Approval Requested.

6. The approver can approve, request further changes, or cancel the specification. If the specification is approved, the status is changed to Approved. If additional changes are requested, the specification status reverts back to In Progress. If it is canceled, the status is changed to Canceled.

Note: The specification can be approved when it’s in any state except Input Requested or Canceled.

5.1 How Do I Add Definitions to a Specification?
Go to your specification page and click the Definitions tab for the report. Type the name of the definition you want to add to the report in the Associated Definition Name field. The Data Cookbook will find the definition as you type in the name. Select the definition name and add any necessary details regarding how the definition will be included on the report. You can indicate:

- Whether or not the definition will display on the report and details on how it will display.
- Location of the definition on the report (e.g., “centered in the header,” “upper left,” etc.).
• Reference for the definition. For example, if the definition is being mapped from a legacy report on which it is described by a different name, you can indicate the definition name on the legacy report. Or if the definition name is many more characters than the values it represents, you can replace it with something shorter.
• Whether or not a data element/definition is to be aggregated (totaled, counted, averaged, etc.), and any information about the nature of the aggregation.

**AR Aging Dashboard**

<table>
<thead>
<tr>
<th>Name</th>
<th>Display Info</th>
<th>Field Info</th>
<th>Aggregate Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR Amount</td>
<td>Display: Yes</td>
<td>Loc: Parameter Entry</td>
<td>Aggregate: Yes</td>
</tr>
<tr>
<td>Aging Period</td>
<td>Display: Yes</td>
<td>Loc: Parameter Entry Pie Chart</td>
<td>Aggregate: No</td>
</tr>
<tr>
<td>Receivable Category</td>
<td>Display: Yes</td>
<td>Loc: X-axis</td>
<td>Aggregate: No</td>
</tr>
</tbody>
</table>

Ref:

Note: You cannot add definitions that have not yet been created to your specification. If the definition you want to add to your specification has not been defined in the Data Cookbook yet, you can use the Create a New Definition link from within the specification.

Note: Specifications and Definitions are not linked at the version level. That means if you chance a definition so that it is no longer appropriate for any or all of the specifications it is attached to, you will need to update those specifications as well.

### 5.2 How Do I Add Other Details?

The Data Cookbook lets you add a great deal of detail to your specification. The more precise and straightforward information you provide in your specification, the easier it will be for your developers to create the deliverable you need. Also, data consumers use the Data Cookbook to learn more about the reports and specifications they view.
To add information to your specification, go to the specification and then choose one of the following tabs

**Overview**
Use the Overview tab to add details including:
- the purpose of the specification
- a description of the specification (this can be text and/or an attachment such as a word processing document or image)
- the specification owner.
- any functional areas to which the specification relates
- the data system where the specification will be executed
- how to access the specification in your reporting environment
- tags
- any additional miscellaneous information

**Selections**
Use the Selections tab to specify selection criteria. For example, if you want a report that includes only entering admitted students, you can use the Selections tab to indicate that. You choose an attribute from the list of definitions in your Data Cookbook, an operator (such as “is true” or “equal to”), a condition (this is free text), and whether or not the user is prompted for a value (a parameter). You can also enter a description of your selection set, which may be more valuable for users who don’t read code or pseudocode.
Note: the Selection Criteria functionality for specifications is not a full-featured set of Boolean operators. It exists to help functional users understand how the specification limits the results set.

Sort Criteria
Use the Sort Criteria tab to indicate how you want information to be sorted on the report. For example, you can indicate that you want the report to sort students alphabetically by their last name.

Technical
Use the Technical tab to include additional technical information. This could be the full text of the query, it could be a techno-functional description of how the data is extracted or transformed in the context of the current specification, or it could be some other kind of heads-up for other Data Cookbook users.

The technical tab also shows the technical definitions for each of the definitions added to the specification, if a data system has been selected for the specification. You may have specifications that need to query multiple data systems; if so, the technical tab allows you to choose a different data system for any definition you've added, and then will display the appropriate technical definition. In the example below, the specification’s data system is “My ERP System,” but the data system for at least one of the definitions is “My Warehouse.”

Display Details
Use the Display Details tab to provide a sample of the deliverable you want to be built. There is room to show a sample header, body, and footer. You can also give a description of the output (including output type, such as “columnar report” or “text file”) and indicate the delimiter that should be used.
Attachments
Use the Attachments tab to attach any files that might be of use when building the report, such as a sketch or mock-up to clarify the display, or a sample of another report with changes highlighted.

5.3 How Are Specifications Approved?
After the specification worker or manager assigned to a specification has finished developing it, they can go to the Collaboration tab for the specification and submit it for approval by clicking the “Request Approval” button.

Annual Revenue Rpt

The specification is sent to the approver’s To Do list. Remember, the person who approves a specification is also the person who requested it (or to whom the Requester role was delegated). The Data Cookbook will notify this person that their approval has been requested. And the next time the approver logs into the Data Cookbook, he or she will see that the specification needs to be reviewed. The approver can click on the To Do item to go straight to the report that needs to be reviewed.

After reviewing the specification, the approver can go to the Collaboration tab page to approve (or resubmit, or cancel) the specification. Space is provided to include comments when you approve and cancel specifications. A canceled specification is like a rejected
definition in that it continues to exist in the Data Cookbook but will only display in certain circumstances.

Financial Aid Awards In Progress

5.4 Versions
Specifications have versions in the Data Cookbook. When a new specification is approved, the approved version becomes Version 1. This is the version that corresponds with the actual reporting deliverable.

Any changes to the specification will generate a new version. For example, your institution has an approved specification called the Incoming Freshman Report, currently at Version 1. Enrollment submits a change request to add phone numbers to the report, so you access the Incoming Freshman Report in the Data Cookbook, click on the Request a Change link, and edit the specification. When you update the specification, Version 2 is automatically created.

When a new version of a specification is requested, it must go through your approval process once again.
6 Communicating through the Data Cookbook

The Data Cookbook will notify you when definitions and/or specifications require action from you. These notifications are dictated by your user role(s) and your email notification settings.

6.1 Email Notification Settings
Your notification preferences are found on your profile page. Click your name to access your profile page. As we saw in Section 1, you click the Edit Profile/Change Password link to change your email notification settings.

6.2 Requesting Input & Approval
When you are working on a definition or a specification you have been assigned, or when you are preparing to approve either, you may want to request additional information. You can request additional information from the person who submitted the change request (or new specification) by using the Request Input button found on the Collaboration tab for the specification. The Request Input feature allows you to send details regarding your question(s) through the Data Cookbook. The request for information will show up on the initial requester’s Home tab, and (depending on his or her email notification settings) they will receive an email notifying them that one of their specifications requires action. A special feature of definitions is that if someone has been added as a content contributor, that person as well as the definition creator will receive the Input Requested notification.

The Request Approval feature works the same way. If someone else must approve a definition or specification you are working on, you can use the Request Approval button (found below the version information in a definition and on the Collaboration tab for a specification). The request will show up on the approver’s Home tab and (depending on the approver’s email notification settings) the approver will receive an email letting them know that it is time to review and approve your specification.

6.3 Commenting
At every point in the collaboration and approval process you have the option to add a comment. For example when a functional area moderator wants to send a definition back to its creator, or another content contributor, they might add a comment requesting additional clarification or detail.

Any user can use the Data Cookbook commenting feature to add comments and questions to any definition or specification, at any point in their lifecycle. When you submit a comment, the comment will be displayed as part of the feed both on your Home tab and on the owner’s Home tab to facilitate communication.
6.4  **Sample Stream of Communication**
Mary Requester creates a new request for a specification called Rising Seniors. The Rising Seniors specification is assigned by Susan Manager to Joan Worker. Joan has her email notification settings configured to notify her immediately when a definition or specification requires an action from her, so she receives an email telling her about the request and the request appears on her Home tab to do list.

Joan reviews the request and develops the specification in the Data Cookbook until she realizes that Mary Requester might find the report more useful if phone numbers for the Rising Seniors were included. Joan uses the Request Input feature on the Collaboration tab to ask Mary if she wants phone numbers to be included. Mary Requester also has her email notification settings configured to notify her immediately when a definition or report requires action from her, so she receives an email regarding Joan's question and the request for input displays on her Home tab. A record of the input request is also made in the specification.

Mary replies via the Data Cookbook that including phone numbers is a good idea. Joan is notified via email and Home tab to do list, and a record is made of Mary’s reply in the specification. If the definition for phone number doesn’t exist, Joan creates it and submits it to Alice Approver. Alice reviews it and may decide to edit it herself or to invite a colleague to help edit. When it’s complete, she approves it and it joins the other approved definitions in the Data Cookbook. Although Joan can include the pending definition on her specification while she works on it, she will also receive an e-mail notification when the definition has been approved.

Joan completes the specification and submits it for Mary Requester’s approval. Mary is notified via email and Home tab to do list and reviews the specification. Mary Requester approves the specification, and Joan is notified via email and Home tab to do list.
The Data Cookbook is an online community platform that offers users the opportunity to participate in a collaborative environment where definitions, specifications, and files are shared. Users can also engage with each other through the Data Cookbook forums.

The Data Cookbook provides a rich community experience with contributions from various organizations such as Achieving the Dream, Common Data Set, IPEDS, Maryland Higher Education Commission, Middle States Commission on Higher Education, Predictive Analytics Reporting Framework, Texas Higher Education Coordinating Board, Utah System of Higher Education, Bowling Green State University, and Bucknell University.

The Data Cookbook's community contributors include institutions and organizations focused on higher education, aiming to enhance data sharing and collaboration in the educational sector.
7.1 Organizations
The Organizations link provides a full link of organizations taking part in the Data Cookbook community, and displays how many of each kind of object each organization shares.

7.2 Definitions
The Definitions link takes you to a full, searchable list of definitions made public by organizations using the Data Cookbook.

You can browse, search, and copy any public definition in this list. When you click on the ‘Copy’ button next to a definition, the definition is added to a queue available via the Copy Queue link on the menu bar, or by clicking on the new ‘In Queue’ button that appears after clicking ‘Copy’. The definition has not been copied yet. You must complete the rest of the steps under ‘Copy Queue’ to bring the definition into your organization.

7.3 Specifications
The Specifications link takes you to a list of specifications made public by Data Cookbook members. You can click on a specification name to view the details of that report. Clicking on the print icon to the right of the name will load a PDF version of the report that includes all the functional definitions for any public definitions listed in the Specification.

Note: You cannot import shared specifications into your instance of the Data Cookbook.

7.4 Forums
The Forums link provides access to the Data Cookbook forums. IData moderates these forums. Please report any misuse or inappropriate material.

Note: the Data Cookbook forums are not open to the public. They can only be seen and contributed to by Data Cookbook clients.

7.5 Copy Queue
There are two ways to copy definitions from the Community:
   a.) Use the ‘Copy All Definitions To My Data Cookbook’ button for an organization, to copy all the public definitions of that organization.
   b.) Click the ‘Copy’ button next to each definition to copy that specific definition. When you click ‘Copy’ the button will change to say ‘In Queue’. If you click the ‘In Queue’ button, you will go to the Copy Queue page.
Before you can copy a definition to your organization you must assign it a Functional Area. The Functional Area you select in the copy queue will be applied to all definitions you have chosen to copy. If a definition you have chosen to copy has the same name as a definition currently in your organization you will be asked to enter a different name. Alternately, you can choose to apply a prefix or suffix to imported definitions, either to each one or only in the case of a conflict. Use the radio buttons in the interface to make these adjustments.

You can remove any definitions from the queue by clicking the 'X' button on the top right.

The copy queue is intended to be a starting point for a definition. You can change any and all fields related to a definition. If you do not automatically approve a definition on copy, that
definition will be in the pending state and you can continue to make changes from the standard definition browse page of your organization (it will be removed from the copy queue).

If you have chosen to copy a large number of definitions, you will likely get a compressed view of the Copy Queue.

**Public Definition Copy**

![Image of Public Definition Copy interface]

You have selected to copy 558 definitions from IPEDS. This operation can take several minutes.

**Full List**

- 11/12 month salary contract/teaching period
- 12-month enrollment (EL2)
- 12-month period
- 25th percentile
- 3/2 program
- 4-1-4 (calendar system)
- 9-12 (calendar system)
- **Facility**
- Fall Enrollment (EL)
- Fall Staff (S)
- Fall cohort
- Fall term
- Federal Work-Study (FWS)
- Federal government grants and contracts
- Federal Work-Study (FWS) (expenditures)
- Federal Work-Study (FWS) (expenditures -- FASB and GASB aligned form reporters)
- Federal Work-Study (FWS) (expenditures -- FASB and GASB unaligned form reporters)
- Federal Work-Study (FWS) (expenditures -- GASB unaligned form reporters)
- Other Teachers and Instructional Support Staff

You are still required to assign a functional area, however you will not be able to edit individual definition fields. You can remove a definition from the list by clicking on its name. The definition name will be stricken out, and it will not be copied.

**8 Integrating the Data Cookbook with Other Tools**

IData currently supports several APIs for the Data Cookbook. These APIs are set up to allow your own scripts, websites or custom applications to access content in the Data Cookbook.

The technical details of each of these APIs are discussed in the API documentation.