



# Purdue University - Data Cookbook

Specification Standards for  
Reports, Dashboards, and Dimensions

June 2021

New COVID-19 Standards Added. See page 12 for more information.

For feedback or questions please email [Data Governance](mailto:datagovernance@purdue.edu)  
(datagovernance@purdue.edu)

[Data Cookbook Login](https://purdue.datacookbook.com)

(<https://purdue.datacookbook.com>)



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## 1 Audience: Specification and collection creators, reviewers, approvers

Those who draft, edit, review, and/or approve specification (spec) and collection content in Data Cookbook.

Functional data owners review and approve the specs and collections ensuring accuracy, completeness and adherence to the standards.

Please be aware that as spec and collection creators, reviewers, approvers, you have a role in the Workflow functionality and will receive emails from Data Cookbook as part of the process. Emails are caught in the Spam folder, so will need to Release and Add to Safelist the first time.

## 2 Training Documents Library

All Users:

- Quick Reference for Getting Started

Definition Authors:

- One-page Quick Reference for the Standards of Creating a Definition
- Standards for Creating a Definition
- Short Version for the Definition Approvers

Specification Authors:

- Standards for Creating a Specification
- Short Version for the Specification Approvers

For feedback or questions please email [Data Governance](mailto:datagovernance@purdue.edu) (datagovernance@purdue.edu)

LAUNCH [DATA COOKBOOK](https://purdue.datacookbook.com); (https://purdue.datacookbook.com)

Data Cookbook works better on Chrome, Firefox, and Safari browsers, so we recommend you to use one of these browsers. Please avoid using Internet Explorer (IE), since Data Cookbook is not working well on IE.

## 3 Specifications

A **specification** (spec) is a Data Cookbook term for information for a particular *report or dashboard*. The Spec contains a listing of all the fields contained in the report/dashboard as well as information about the purpose, appropriate use, caveats, intended audience, owner area, access details, additional information and any data quality information of which to be aware.

### 3.1 Creating a Specification and the Specification Standards

Specification templates define the structure of a specification through the tabs and attributes that are presented to the user when they create a new specification. A specification template has overview, data items, display and attachments tabs. In the following sections, each tab of the specification template and the fields in each tab are briefly described.

- **Overview Tab**

Overview tab provides general information about the spec and it includes following fields:

### Specification Name

A **specification name** should match or be similar to the report/dashboard name used for the standard Cognos report, Data Digest or Management Dashboard. These will have gone through a standards review and governance approval process.

Because Data Cookbook is enterprise, the specification name may contain additional words such as:

- Subject area (ex. Student, Employee)
- Source (ex. Data Digest, IPEDS)
- Timing (ex. Census, Month End, Snapshot)

Example: 'Student Enrollment, Data Digest, Census'

### Specification Name Standards

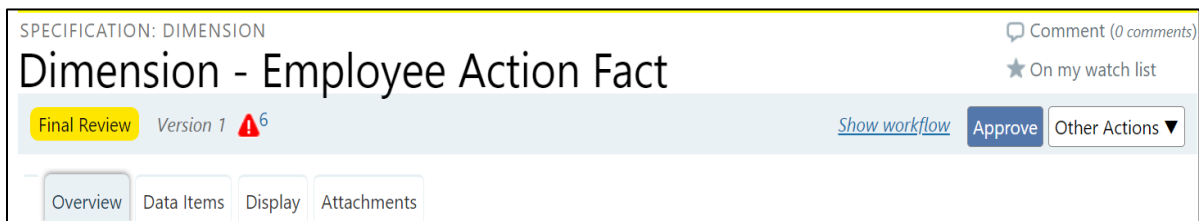
- Use Title Case - capitalize first letter of each word, with exception of short words (e.g., a, the, by, for).
- Omit "A", "An", and "The" from the beginning of the name.
- Delete leading and trailing white spaces (can occur when cutting and pasting from other sources). Data Cookbook will treat "Grade Roster" and "Grade Roster<trailing space>" and "<leading space>Grade Roster" as different specs.
- Because, Cognos standard reports and Data Digest dashboards may contain some of the same information, you may need to crosswalk the name of the approved standard Cognos report with the Data Digest name.

Examples:

'Enrollment Summary & List – Census' (Cognos standard report)  
'Student Enrollment' (Data Digest dashboard)

- For SAP Data Mart tables of Stars, please use the following format: Dimension - <Table Name>

Example: Dimension - Employee Action Fact



### Specification Type

Select from the drop-down list. If another type is needed, please contact: [datagovernance@purdue.edu](mailto:datagovernance@purdue.edu)

### Functional Area(s)

Select from drop down box. May select more than one. Be aware that workflow approval as well as searches are based upon functional area. If more than one is selected, functional data owners from each area must approve the spec.

## Purpose

This should be very brief statement of the purpose of the specification indicating how it meets the University or unit's need for the information. It is written in understandable language for the Purdue community audience.

## Description

This is a more detailed explanation including filters, parameters, etc. used in the report. Intended Audience can also be listed in this area. For example: executive decision-making, general public, transactional auditing.

## Owner

Office responsible for the report/dashboard. If known by an acronym, begin with that and spell out full name. Please make sure you use the same owner name in the same format for all of your specs to be consistent.

Example: IDA+A – Institutional Data Analytics and Assessment

## Access Details

Include any information re: access, specific roles required to access this spec and how to request the role.

Example:

Because Data Digest dashboards are available to the public, and small cell sizes can occur when filters are used, access to department and major level is limited to Purdue faculty and staff only. To request access to department and major, send email to [datadigest@purdue.edu](mailto:datadigest@purdue.edu)

## Source Data Systems

Please choose the data system from which the data in the report or dashboard is generated from the drop-down menu. May select more than one if needed. Options include Banner, SAP, I2A2, and other systems such as Transact System. If another source data system is needed, please send an email to [datagovernance@purdue.edu](mailto:datagovernance@purdue.edu)

## Tools

Please choose the system or program that is used to generate the report or dashboard from the drop-down menu. Options include Cognos Reporting, Employee Central Reporting and Tableau Desktop.

## Additional Info (optional)

This section should detail any caveats for the report/dashboard that the user might need to know. This information should include anything in the help text of dashboards.

Example:

College of Health and Human Sciences did not exist prior to Spring 2011, but has been coded to be filled in through the past as if it had always existed.

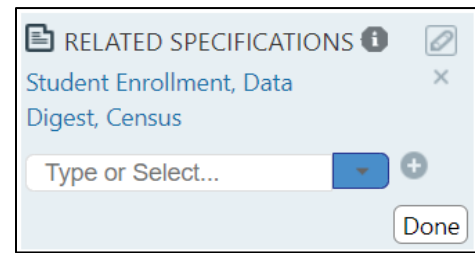
## Sidebar Fields on the Overview Tab

### Related Specifications

Any specification related to the current specification are listed here. Editors can relate other specifications to in-progress or approved specifications. If similar data/information is provided in

another dashboard or report, you may list them in this area.

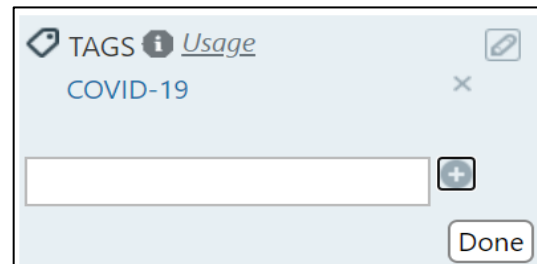
In order to list related specs, hit the pencil icon on the right hand corner, choose the spec from the drop-down menu, hit the + sign next to the drop down menu and then hit "Done" button. You will see the selected spec is listed above the drop-down menu.



## Tags

Tags are searchable words or phrases. We are currently using Data Digest Dashboard, Management Dashboard, and Covid-19 tags. If you would like to use a new tag, please contact us at [Data Governance](mailto:datagovernance@purdue.edu) (datagovernance@purdue.edu)

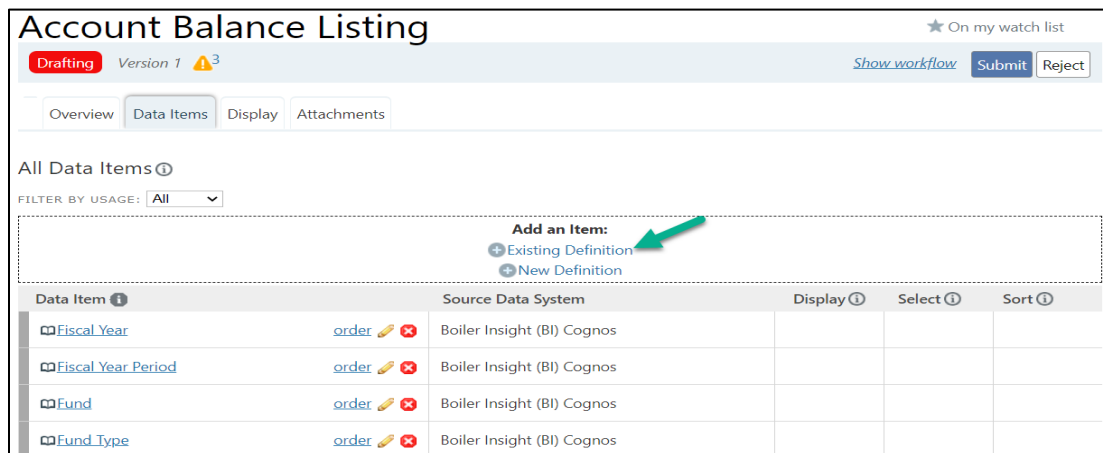
In order to add a tag, hit the pencil icon on the right hand corner, type the tag (example: type COVID-19 for Coronavirus related specifications), hit the + sign next to it and then hit "Done" button.



## • Data Items Tab

Use this tab to document the data items (fields) used for a report specification; these can be definitions or labels. Many are the Cookbook definition name itself; however if a different label is used on the report/dashboard, document it here. That way it is clear to the data community what definition is being used in the report/dashboard. If the item is an existing definition, click on the "Existing Data Item or Definition" and choose from the drop the drop-down menu. If it is a new definition, please create the definition by clicking on the "Create a New Definition" button.

Example:



## • Display Tab (optional)

Use this tab to add additional information about the definitions or labels on the data items tab or to display additional notes if needed about the data items for the spec. You can change the Display Mode by clicking on the Change Display Mode button. Different options on this page change based on the selected display mode. Choices are "Image mock-up with pin drop"; "sample attachment"; and "full text description".

Choose “Image mock-up with pin drop” option to add an image of the dashboard. To add an image of the desired report, click Add image and select a photo to upload. You can load any type of graphic file, such as a PNG, JPEG, GIF, or TFF. The optimal file size is 643px wide; wider files will display, but require horizontal scrolling to view the full image. The image you upload is also saved as an attachment (available from the Attachments tab). You can load only one photo. If you load a different image, the attached file is replaced.

Choose “Full text description” option if you need a text area for including a description of the display. You can also add information about the header and footer of the report/dashboard.

- **Attachments Tab (optional)**

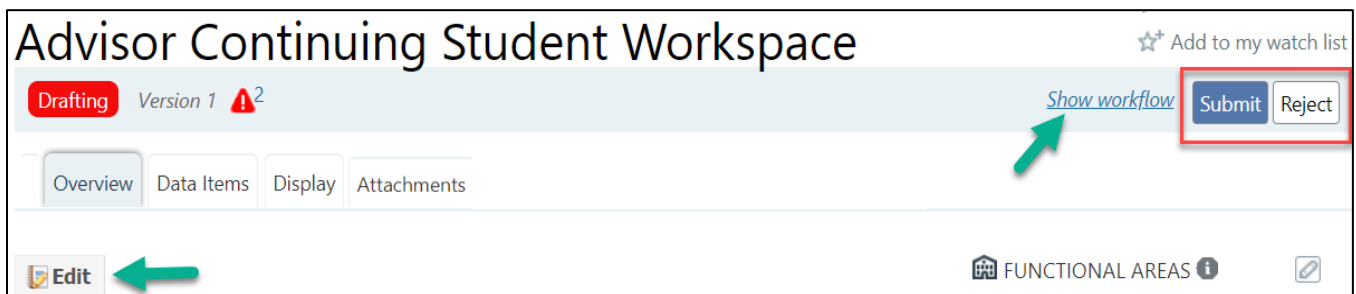
If there is a document that provides more information about a report or dashboard, it can be included as an attachment by uploading it to this tab.

If you added an image of a dashboard in the “Display” tab, it will be also saved as an attachment in this tab.

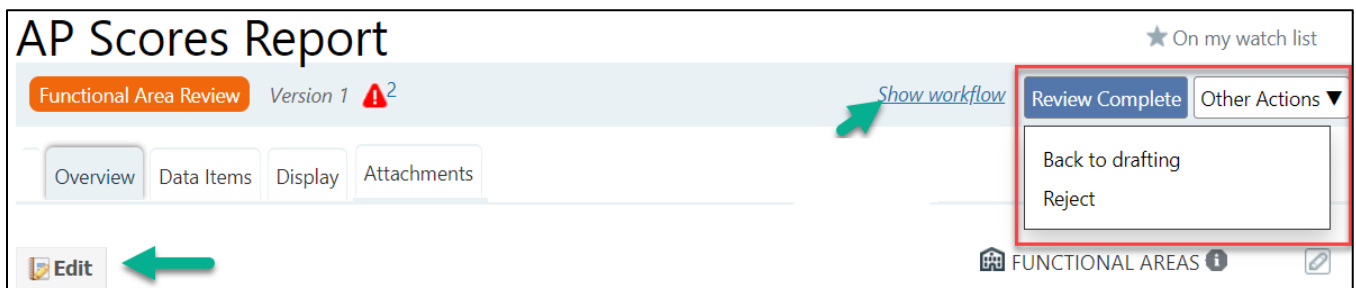
### 3.2 Editing/Approving a Specification and Creating a New Version of a Specification

**Editing/Approving a Spec:** Use the “Edit” button to update the spec and hit “Save” button at the bottom of the page.

- **If the spec is in the “Drafting” stage:** If you are done editing, you can hit “Submit” button to send it to the “Final Area Review” in the Workflow. Please hit “Reject” if you think this spec is not needed anymore. You can see the workflow by clicking on the “Show Workflow” button.



- **If the spec is in the “Functional Area Review” stage:** If you are done editing, you can hit “Review Complete” button to send it to the “Final Review” in the workflow. If you think spec needs more work, please hit “Back to Drafting” and please hit “Reject” if you think this spec is not needed anymore. You can see the workflow by clicking on the “Show Workflow” button.



- **If the spec is in the “Final Review” stage:** If you are done editing, you can hit “Approve” button to send it to approve the spec. If you think spec needs more work, please hit “Back to Drafting” and please hit “Reject” if you think this spec is not needed anymore. You can see the workflow by clicking on the “Show Workflow” button.

**Creating a New Version of a Spec:** To create a new version of specification hit “Request a Change” button as shown in the picture below. This is for making edits on the approved specs.

It opens up a request a change form and you do NOT need to fill out this form since the fields in the form are not mandatory. Please hit the Submit button at the end of the form to create a new version of the spec.

If you need to edit it, you can hit the “Edit” button. The new version of the spec will be in “Functional Area Review” and you can see the version number next to the Functional Area Review label.

**Note:** Data Cookbook has a Collections feature which allows you to group related specifications (dashboard, report, or dimension) and manage this group through the Data Cookbook functionality of workflows. For example, we can use collections to group a set of related dashboards or reports so that users can easily find them.

If you would like to create a collection, please email us at [Data Governance](mailto:datagovernance@purdue.edu) (datagovernance@purdue.edu) for more information.



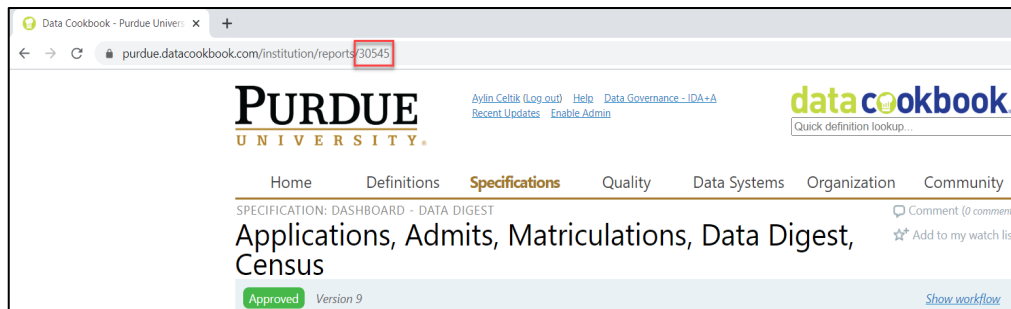
## 4 Adding a Pop-Up Window to the Dashboards and Reports

Cognos and Tableau will include a code in their reports and dashboards to allow a consumer to view the approved specification details stored in Data Cookbook which provide information on the metadata included in the report or dashboard. For example, a Cognos report author might include a button object on the report to allow the person running the report to click the button and see the detailed information from Data Cookbook displayed within the Cognos application in the form of a pop-up or portal window.

To add the code to a report or dashboard you must have an approved specification.

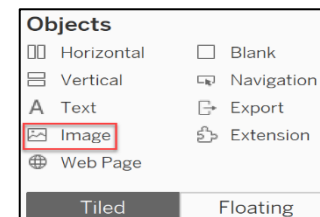
How to find the unique code that is assigned by the Data Cookbook?

**It is at the end of the URL of the spec in the Data Cookbook.**

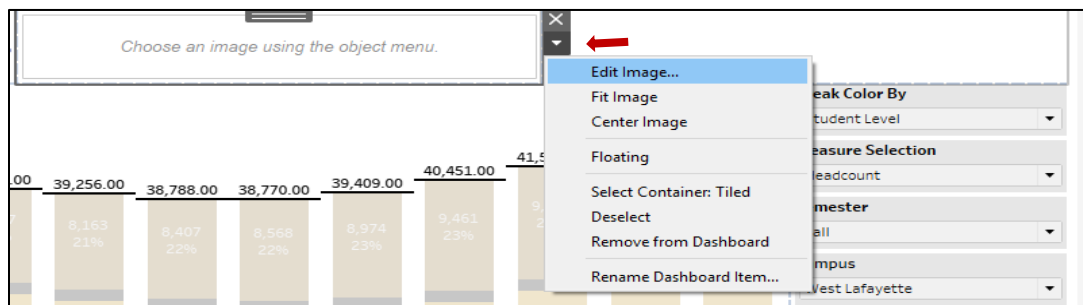


### 4.1 Adding a Pop-Up Window to a Tableau Dashboard

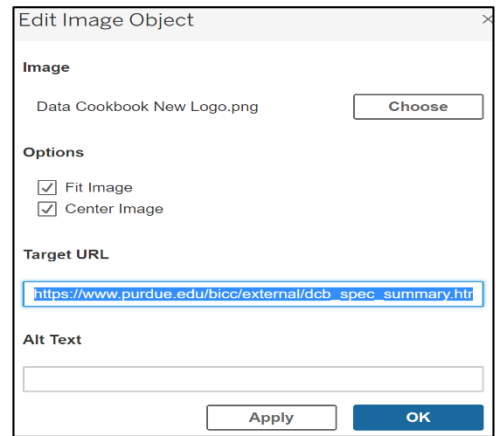
- Go to the following website to download and save the Data Cookbook image into your computer: [Data Cookbook image](https://www.purdue.edu/bicc/external/images/cookbook.png) (https://www.purdue.edu/bicc/external/images/cookbook.png)  
Right click on the image that opened up in a browser, hit “Save Picture As” and save it somewhere in your computer.
- On the dashboard tab, go to the bottom left to the objects panel. Hover over the image icon and drag it to the top of the dashboard and drop it on top of the dashboard.



- “Edit Image Object” box will open up. If it doesn’t open, click on the down arrow on the right of the image box to get the dropdown menu and select Edit Image.



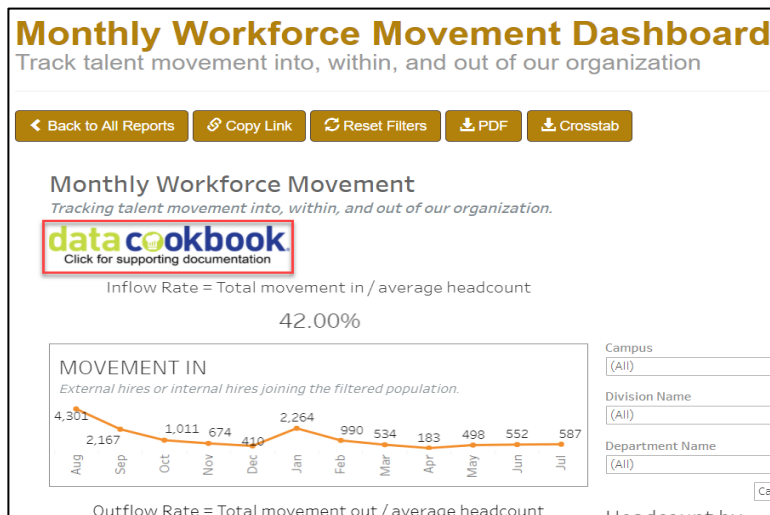
- “Edit Image Object” box is where you will choose the image and place the target URL for the spec portal pop-up.
  - Click on “Choose” button and navigate to where you have the image stored to select it.
  - Check the “Fit image” and “Center image” boxes if they are not already selected. C
  - Copy the URL for the spec using the portal pop-up syntax and place it in the “Target URL” box.
  - Click OK.



Example Target URL: [https://www.purdue.edu/bicc/external/dcb\\_spec\\_summary.html?report\\_id=30545](https://www.purdue.edu/bicc/external/dcb_spec_summary.html?report_id=30545)

**ONLY CHANGE THIS  
UNIQUE ID FOR EACH SPEC**

Example of a final product:



## 4.2 Adding a Pop-Up Window to a Cognos Report

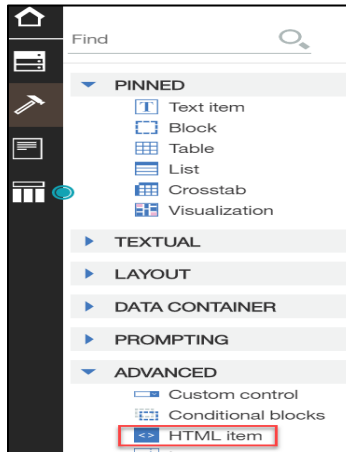
- HTML syntax: (Please replace the unique ID that is assigned by the Data Cookbook to the specific specification at the end of the URL of the spec in the Data Cookbook)

```

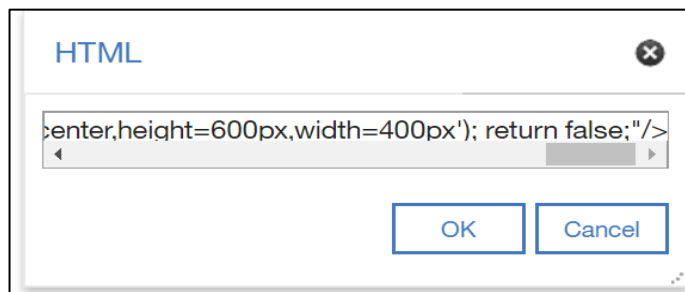
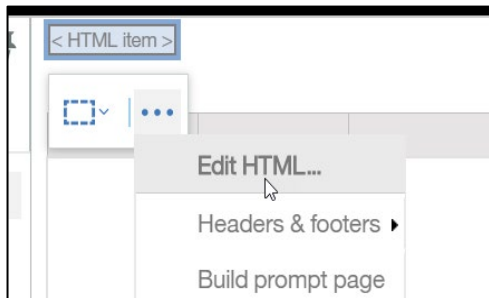
```

**ONLY CHANGE THIS  
UNIQUE ID FOR EACH SPEC**

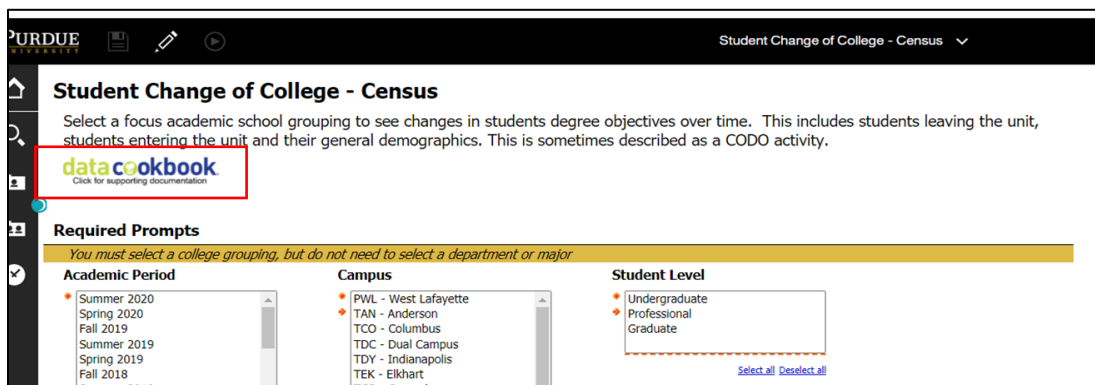
- Drag the HTML Item under the Advanced tab from the Toolbox on top of the report:



- Hit three dots and then hit Edit HTML and enter the syntax and hit OK.



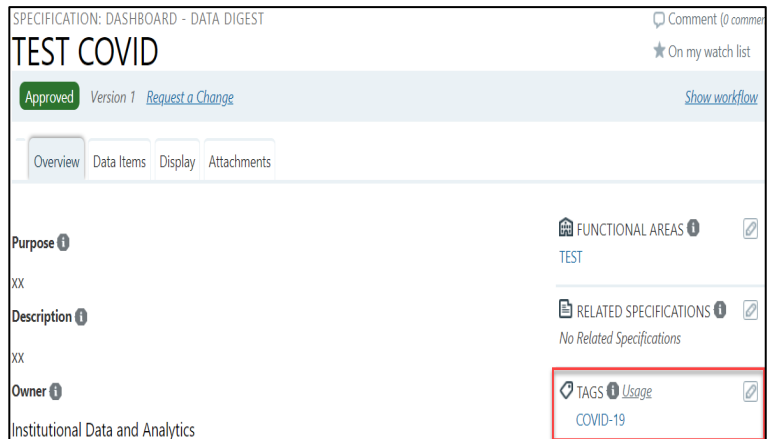
Example of a final product:



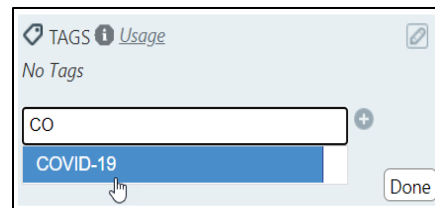
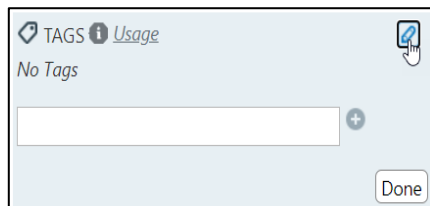
## 5 COVID-19 Standards

This part explains all the COVID-19 standards that need to be followed in order to help the Purdue community to keep track of all COVID-19 related specifications. We need to make sure the specifications follow these standards to ensure that a user can easily access to all COVID-19 related specifications by using search and tag features in Data Cookbook.

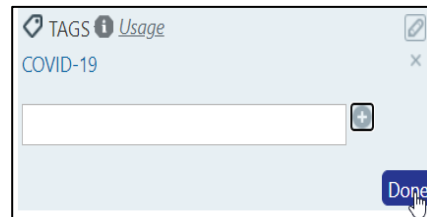
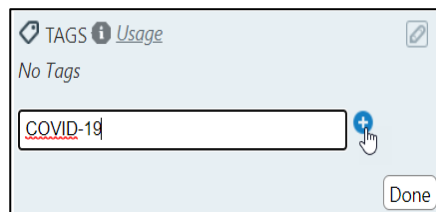
- Create a tag of 'COVID-19' for the spec from the tag field on the side bar. Tags are searchable words or phrases. They are used as a filter on the browse page and they may be shared by multiple specs. For example, hit the Specifications tab and from the Tag filter and choose "COVID-19" to see all COVID-19 related specs with that tag. You can add a tag at any stage in the workflow.



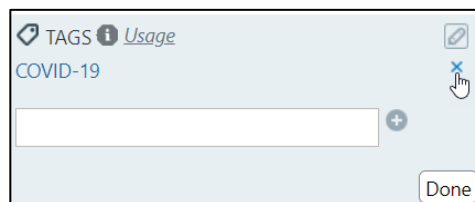
**Creating a Tag:** Tags box is on the side bar. In order to create the tag, hit the pencil icon on the right upper corner and type COVID-19 (when you type "CO", you may see COVID-19 in the drop-down menu and you can choose it.). Please make sure that you put the hyphen in between in order to make sure that the same tag is given to all COVID-19 related specs. Otherwise, your definition will not show up when a user filter down with the COVID-19 tag.



Then hit the + sign next to it and "Done" button.



**Removing a Tag:** Hit the X button next to the tag below the pencil sign.



- Add following keywords at the end of the specification description. Please make sure that you include all the variations of the word COVID-19. **We recommend you to copy/paste the following list of keywords.**

Keywords: Coronavirus, Covid, Covid19, Covid 19, Covid-19, Corona, virus, outbreak, pandemic

Specification Name Specification Name Standards

TEST SPEC

Specification Type 1

Dashboard - Data Digest Data Digest

Purpose 1

Source | | | | | Size | **A** | **B** | **I** | **U** | **S** | |

Description of the spec.

Keywords: Coronavirus, Covid, Covid19, Covid 19, Covid-19, Corona, virus, outbreak, pandemic

## Appendices

### A. Glossary of Terms

Approver	Functional data owner role responsible for review and approval to put a data element, specification into production
Data Classification	Displays the level of sensitivity (public, sensitive, restricted). These were developed by Purdue data stewards.  Additional information can be found at: <a href="https://www.purdue.edu/securepurdue/data-handling/index.php">Data Classification and Handling Procedures</a> ( <a href="https://www.purdue.edu/securepurdue/data-handling/index.php">https://www.purdue.edu/securepurdue/data-handling/index.php</a> ) <a href="http://www.purdue.edu/registrar/currentStudents/students/personalDirectory.html">Personal Directory Information</a> ( <a href="http://www.purdue.edu/registrar/currentStudents/students/personalDirectory.html">http://www.purdue.edu/registrar/currentStudents/students/personalDirectory.html</a> )
Data System	Not implemented at this time for Definition creation. Used when specs are entered.
Editor	Role with access to edit a definition or specification.
Functional Area	Subject area. Some also have sub-functional areas.
Functional Definition	Multi-paragraph explanation, conceptual description, list of values, cautions and any specific access requirements re: a data element.
Functional Data Owner	Person (or designee) responsible for data in that functional/subject area. Responsible for the collection of accurate, complete data and accompanying audits to maintain data quality and integrity.
Specification	Any standard report or dashboard. Sometimes referred to as 'BI content'.
Technical Definition	Not implemented at this time.
Workflow	Process to create, edit, review and approve a Data Cookbook definition. Will also be used for Specifications and Info Requests

## B. Abbreviation Exceptions List

AAP	Affirmative Action Plan
CDL	Commercial Driver’s License
CMc	Construction Manager as Constructor
CPM	Capital Program Management
CSA	Campus Security Authority
CUL	Capacity Utilization Limit
DB	Design Build
DBB	Design Bid Build
FLSA	Fair Labor Standards Act
FMLA	Family and Medical Leave Act
FRCD	Final Review Construction Document Date
FTE	Full-Time Equivalent
GPA	Grade Point Average
IBS	Institutional Biosafety Committee
ID	Identification
IPEDS	Integrated Postsecondary Education Data System
IRB	Institutional Review Board
IRG	Internal Report Group
LTLs	Limited Time Lecturers
MWVBE	Minority, Women, and Veteran-owned Business Enterprises
OIE	Office of Institutional Equity
P3	Public Private Partnership
PACUC	Purdue Animal Care and Use Committee
PBD	Personal Business Day
PERNR	Personnel Number
PH	Personal Holiday
RTR	Right to Return
SMAS	Space Management Academic Scheduling
SPW	Small Public Works
UPOF	Utility Plant Office Facility
URL	Universal Resource Locator
URM	Underrepresented Minority
WBS	Work Breakdown Structure
WBSE	Work Breakdown Structure Element

## C. Additional Tips

Adding words to Chrome dictionary	When in Chrome, type the word (such as FTE, unduplicated), right click and “Add to Dictionary” to stop it from marking it as a misspelling.
Right click to open a new window	Open a new window to avoid losing your place in Cookbook or closing it inadvertently
Log out of Browser	To totally log out of Data Cookbook, need to close browser as well as Data Cookbook. This is a best practice.