

# Quick Tutorial on the Data Cookbook

## Logging In

Using your browser, go to: [http://\\_\\_\\_\\_\\_.datacookbook.com](http://_____.datacookbook.com)

Use the following credentials to log in:

Login: \_\_\_\_\_

Password: \_\_\_\_\_

The screenshot shows the login page for the Data Cookbook. At the top left is the IDATA UNIVERSITY logo, and at the top right is the DataCookbook logo. Below the logos is a 'Community' link. The main heading is 'Log In'. A welcome message states: 'Welcome to the IData University Data Cookbook! This knowledgebase provides definitions and specifications of our institutional reporting. Enter your NetID login and password below to access. If you need help getting started, enter a help desk ticket here: <http://support.idatainc.com>'. There are two input fields for 'Login' and 'Password'. To the right of the login fields are three buttons: 'REQUEST ACCESS', 'RESEND ACTIVATION EMAIL', and 'RESET PASSWORD'. Below the password field is a 'Remember Me' checkbox and a blue 'LOG IN' button.

## Home Tab

From here, you can :

[Create a Definition](#)  
[Create a Specification](#)

[Search for a Definition](#)  
[Search for a Specification](#)

[See your To Do List](#)

The screenshot shows the home page of the Data Cookbook. At the top left is the IDATA UNIVERSITY logo, and at the top right is the DataCookbook logo with a search bar. Below the logos is a navigation menu with links for 'Home', 'Definitions', 'Specifications', 'Organization', and 'Community'. The 'Home' link is highlighted. The main content area is divided into several sections: 'To Do List', 'Definitions', and 'Search'. The 'To Do List' section shows a 'PENDING' status and a 'Pending Your Approval' message. The 'Definitions' section shows a definition for 'Persistence Rate' with a version number and update date. The 'Search' section has input fields for 'Definitions' and 'Specifications'. A red circle highlights the 'Create a Definition' and 'Create a Specification' buttons in the top right corner.

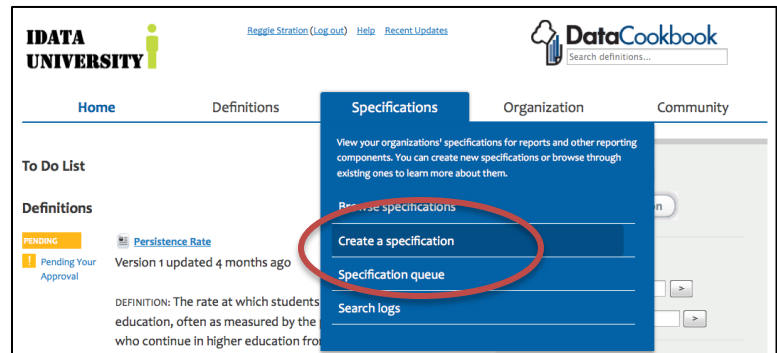
# Quick Tutorial on the Data Cookbook

## Creating a Specification

### Step 1

From the “Home” tab:  
Click on the “**Create a Specification**” button  
- OR -

From the “Specifications” tab:  
Click on the “**Create a Specification**” link



### Step 2

Complete the form as follows:

**Name:** Enter the actual name of the report  
(*skip the Purpose and Description for now*)

**Specification Type:** choose any one

**Functional Area:** choose any one

**Purpose:** This should explain why the specification exists. Describe how it is used and what business process it is part of

**Description:** This should describe the physical attributes of the report. What data is contained, what selections are there, or input parameters.

**Due Date:** choose any date

**Priority:** choose any priority

**Comment:** enter a brief description to help whoever is handling this request

Click on “**Submit Request Now**”

Or - click on “**Submit Request Later**” to allow for editing of the rest of the details of this specification BEFORE submitting it to a queue.

A screenshot of the 'Create A Specification' form. The form has the following fields:

- Name\* (text input)
- Specification Type (dropdown menu)
- Functional Area\* (dropdown menu)
- Purpose ? (text area)
- Description ? (text area)
- Submit to Specification Queue (checkbox)
- Due Date (text input, format mm/dd/yyyy)
- Priority (dropdown menu)
- Comment (text area, prompt: Anything you would like managers to know.)

At the bottom, there are two buttons: 'SUBMIT REQUEST NOW' (green) and 'SUBMIT REQUEST LATER' (white).

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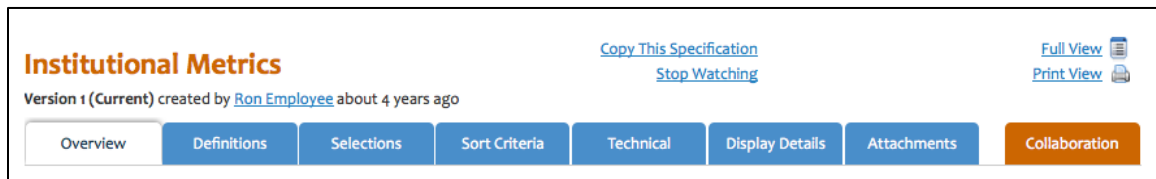
## Editing a Specification

### Step 1

Your specifications are listed in your To Do list on the “**Home**” tab. Or you can find it by searching from the “**Home**” tab or the “**Specifications**” tab.

### Step 2

Choose a tab to work on:



### Step 3

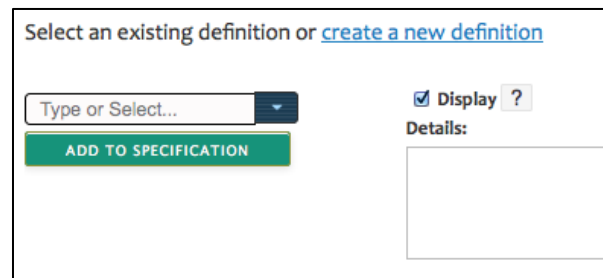
Edit the content as needed:

**Overview:** for the Purpose and Description

- Click on the “Edit” link
- Edit the Purpose and Description, then click on “Save”

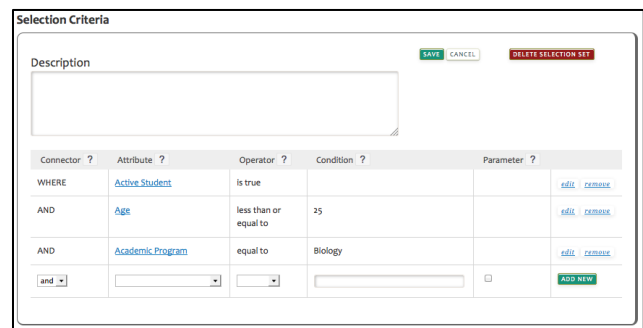
**Definitions:** to relate definitions to the specification

- Type in the name of a definition to add it, OR, click on “**Create a new definition**” link to create and add in one step
- Enter any notes about this definition on this specification in the “**Details**” field.



**Selections:** for the selection for this report

- Fill in the description for this selection set
- Then add specific criteria



Connector ?	Attribute ?	Operator ?	Condition ?	Parameter ?
WHERE	Active Student	is true		<a href="#">edit</a> <a href="#">remove</a>
AND	Age	less than or equal to	25	<a href="#">edit</a> <a href="#">remove</a>
AND	Academic Program	equal to	Biology	<a href="#">edit</a> <a href="#">remove</a>
[and >]	[ ]	[ ]	[ ]	<a href="#">ADD NEW</a>

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## Technical

- This provides a listing of all the definitions along with their technical definitions for reference
- You can provide technical details at the top of the page
- You can also change the data system this specification is using

**Technical Summary**

Data System ?  
My Reporting ODS

Overview ?

SAVE CANCEL

## Display Details

- Click on the “Edit” link
- Enter in a detailed description of how this will be displayed

**Sort Criteria, Attachments, Full View, Collaboration**  
(not needed for this exercise)

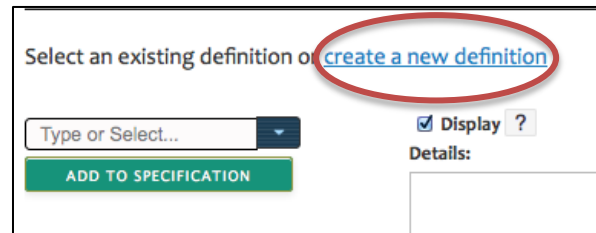
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## Creating a Definition

### From a specification

From the “Definitions” tab on a report, click on the “Create a new definition” link



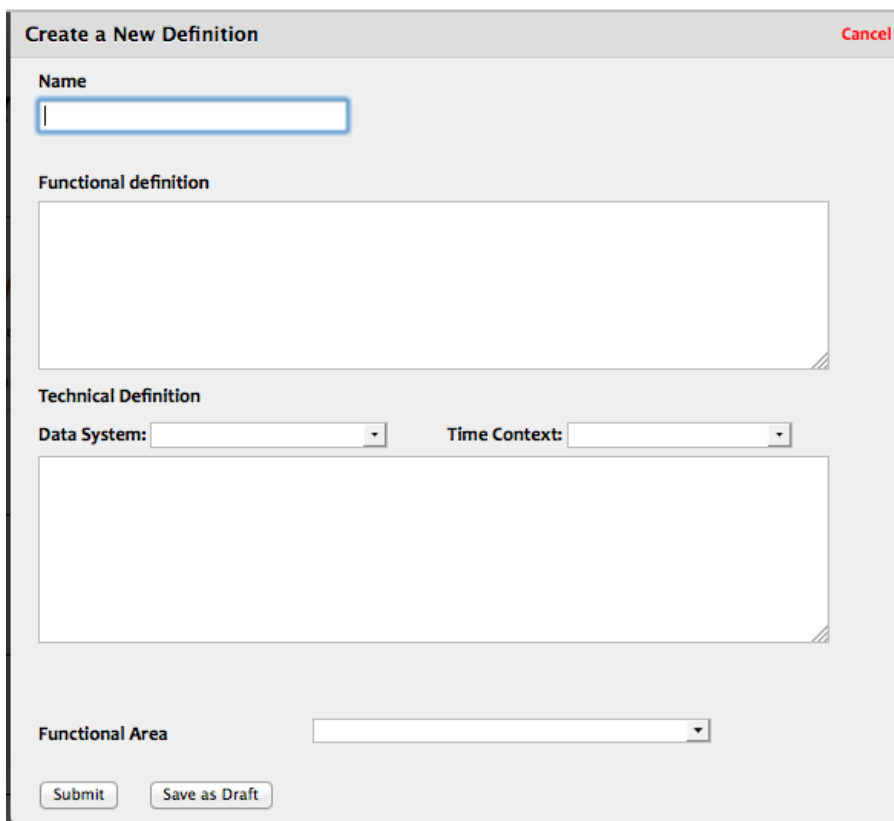
Select an existing definition of [create a new definition](#)

Type or Select...

Display ?

Details:

Fill out the Name, Functional Definition and Functional Area



**Create a New Definition** Cancel

**Name**

**Functional definition**

**Technical Definition**

**Data System:**  **Time Context:**

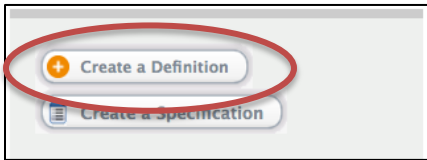
**Functional Area**

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## From the home tab

Click on the “Add New Term” button



Fill out the Name, Functional Definition and Functional Area

### New Definition

**Name**

  
**Functional definition**

[▲ SCAN FOR MATCHES](#)

**Source**

Select an existing source:

Or create a new source:

**Classification**

Assign an optional classification:

**Share with the public?**

Once approved, the name, functional definition, and functional areas will become publicly available at: *community.datacookbook.com*.

[ADD A TECHNICAL DEFINITION](#)

**Tags (separated by comma)**

**Functional Area**

or [Cancel](#)

# Quick Tutorial on the Data Cookbook

## From the community

From the main Data Cookbook search box, enter a search phrase:

You can see results from your Data Cookbook account first, and then results from the Community are highlighted with the “Public” icon.

Under each public definition, there is a link to “make a local copy”. Click on that to copy it.

The screenshot shows the Data Cookbook search interface. At the top, the search box contains the word "retention" and is circled in red. Below the search box, the word "RESULTS" is displayed in red. A checkbox labeled "Include Community" is checked. The main content area lists several search results for "retention". Each result includes a title, a brief description, and "FUNCTIONAL AREAS". The results are:

- Retention Rate**: The rate at which students stay enrolled in the institution. This is typically measured for a certain cohort of students over a period of time. For example, the retention rate... (Functional Areas: Student)
- Freshman Retention Rate**: The proportion of students who were registered as first time freshmen and then returned the following fall. (Functional Areas: Advancement, Student)
- Persistence Rate**: The rate at which students persist in higher education, often as measured by the percentage of students who continue in higher education from one Year to the succeeding year. To... (Functional Areas: Enrollment)
- Retention Rate**: The rate at which students return to school from one semester to the same semester the following year. A retention rate is calculated as follows: new first time, full time stude... (Public icon, Lewis and Clark Community College, "make a local copy" button)
- Retention Rate**: In higher education discussions, the rate at which students are retained or graduate, and thereby persist, in higher education, as often measured by the percentage of students w... (Public icon, Texas Higher Education Coordinating Board, "make a local copy" button)
- Retention rate**: A measure of the rate at which students persist in their educational program at an institution, expressed as a percentage. For four-year institutions, this is the percentage of ... (Public icon, IPEDS, "make a local copy" button)
- Undergraduate Retention and Persistence**: The percentage of undergraduate degree seeking students who enroll consecutively from one academic year to the next. (Public icon, UA Institutional Research and Analysis, "make a local copy" button circled in red)
- ASB aligned form**: Includes expenses of activities and 's primary missions of instruction, (Public icon, IPEDS, "make a local copy" button)

The screenshot shows a dialog box titled "Make a Local Copy". The text inside reads: "Copying from UA Institutional Research and Analysis". Below this, the title "Undergraduate Retention and Persistence" is displayed, followed by the description: "The percentage of undergraduate degree seeking students who enroll consecutively from one academic year to the next." There is a "Functional Area" dropdown menu with a list of options: "IData University", "--Advancement", "--Demographic", "--Enrollment", "--Financial", and "--Human Resources". At the bottom of the dialog, there are "SUBMIT" and "SAVE AS" buttons, and a "cancel" link.

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## Bulk Copy from the Community

From the “Community” tab, click on the “Organizations” link

The screenshot shows the Data Cookbook website interface. At the top, there's a navigation bar with 'Home', 'Definitions', 'Specifications', 'Organization', and 'Community' tabs. The 'Community' tab is selected. Below the navigation, there's a sidebar on the right with a blue background containing links for 'Organizations', 'Definitions', 'Specifications', 'Forums', and 'Copy Queue'. The main content area on the left is titled 'Community Contributors' and 'ORGANIZATIONS'. It lists three organizations: 'Achieving the Dream', 'Common Data Set', and 'IPEDS'. At the bottom right, there are filters for 'FILES (1)', 'DEFINITIONS (549)', and 'SPECIFICATIONS (46)'. The user 'Jill Yun' is logged in, and there are links for 'Log out', 'Help', and 'Recent Updates'.

Browse through the results and choose an organization to copy definitions from:

The screenshot shows the 'Shared Definitions' page. At the top, there's a button '+ Copy All Definitions to My Data Cookbook' and a link 'Download All Definitions'. Below that, there's a search bar and a 'Showing by Functional Area' dropdown menu. The main content is a table with three columns: 'Functional Area', 'Description', and 'Definitions'. The table has two rows. The first row is for '12-month Enrollment' and the second is for 'Completions'. The 'Definitions' column for '12-month Enrollment' lists several definitions with links to 'new definition' pages. A link 'All 35 definitions in this functional area...' is also present.

Functional Area	Description	Definitions
<a href="#">12-month Enrollment</a>	The purpose of the 12-Month Enrollment component of IPEDS is to collect unduplicated student enrollment counts and instructional activity data in post-secondary institutions for an entire 12-month period.	<ul style="list-style-type: none"><li><a href="#">American Indian or Alaska Native (new definition)</a></li><li><a href="#">Asian (new definition)</a></li><li><a href="#">Black or African American (new definition)</a></li><li><a href="#">Dual enrollment</a></li><li><a href="#">Hispanic or Latino (new definition)</a></li></ul> <a href="#">All 35 definitions in this functional area...</a>
<a href="#">Completions</a>	The purpose of the Completions component of IPEDS is to collect data on the number of awards conferred by	<ul style="list-style-type: none"><li><a href="#">American Indian or Alaska Native (new definition)</a></li></ul>

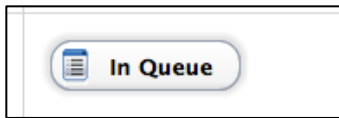
You can either copy ALL, or select a functional area to copy individual definitions from that area.



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The Copy button will change to an “In Queue” button. Click on the “In Queue” button:



Choose a functional area and click on “Create Copies”:

### Public Definition Copy

Assign to all items:

Functional Area

Name\* REMOVE

Functional Definition\*