# data cookbook

## **Purdue University - Data Cookbook**

## **Definition Standards**

June 2021

New COVID-19 Standards Added. See page 15.

For feedback or questions please email Data Governance

(datagovernance@purdue.edu)

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



## Table of Contents

AUDIENCE	1
TRAINING DOCUMENTS LIBRARY	1
ONE-PAGE DEFINITION QUICK REFERENCE	2
WORKFLOW	
CREATING A NEW DEFINITION	
ADDING/REMOVING A COLLABORATOR	
ADDING AN ATTACHMENT (OPTIONAL)	6
FUNCTIONAL AREA REVIEW OF A DEFINITION	6
FINAL REVIEW AND APPROVAL OF WORKFLOW	
NEW VERSION OF A DEFINITION	
STANDARDS FOR CREATING A FUNCTIONAL DEFINITION	9
Definition Name	9
Name Elements	9
Name Standards	9
Functional Definition – Multiple Paragraphs	
Writing a Functional Definition	
Source of Definition	
Classification	
Responsible Office	
Technical Table Name (Only for SAP Data Marts)	
Technical Field Name (Only for SAP Data Marts)	
Data Type (Only for SAP Data Marts)	
Security Level (Only for SAP Data Marts)	
SCD (Slowly Changing Dimension) Type (Only for SAP Data Marts)	
Inactive Flag	
Technical Definition (Only for SAP Data Marts)	
Tags	14
Functional Areas	
Synonyms	15

COVID	-19 STANDARDS	15
Appen	dices	17
Α.	Glossary of Terms	17
В.	Abbreviation Exceptions List	18
C.	Additional Tips	18
D.	Master Data Definitions Naming Standards	19
E.	Additional Attributes	19

#### AUDIENCE: Definition creators, reviewers, approvers

Those who draft, edit, review, and/or approve Data Cookbook content.

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

Data Cookbook is the authoritative metadata source for official Purdue data fields, report and dashboard definitions. All folders labeled 'Standard', accessed with Cognos, as well as management dashboards and data digest dashboards will be documented in Data Cookbook. As the Transformation project progresses, standard reports and dashboards will be defined in Cookbook as well.

This will ensure that all official reporting and decision-making is done using definitions which have been approved by data owners. These approved definitions will be transparent and accessible via Cognos and Tableau.

Please be aware that as definition 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.

Data Cookbook	Definitions awaiting action from you	Wed 11/1/2017 8:52 AM
Data Cookbook	Updates to Definitions you are responsible for	Thu 10/26/2017 3:28 PM

#### 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 and Collection
- Short Version for the Specification and Collection Approvers

For questions and feedback please email Data Governance (datagovernance@purdue.edu)

#### **ONE-PAGE DEFINITION QUICK REFERENCE**

LAUNCH DATA COOKBOOK; (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.

#### Steps:

1. Hover over the **Definitions** tab and click on **Create a Definition**:

Home	Definitions	Specifications	Quality	Data Syste	ms	Organization	Community
Definitio		ions' terminology and def : technical definitions. Edi rove them.			Sear	ch: <sup>(1)</sup>	>
Sort by: Select	Browse Definiti	ons	SE OPTIONS	oply			
Filter by: Workflow definition -	Create a Definit	tion	ost recent first		Tag	∼ - 0	Classification 🗸

- 2. Definition Naming Convention (see full document on Definition Standards for more detail)
  - a. Enter name and search for similar definitions already in Cookbook
  - b. Review Community definitions for ideas
  - c. Avoid numbers and special characters (common abbreviations allowed)
  - d. Ensure name is: Data Element, Descriptor, Functional Area (Optional)

Examples:

- Full Time Equivalent, Student
- Full Time Equivalent, Employee, HR
- Full Time Part Time, IPEDS, Student
- 3. Definition Paragraph Standards
  - a. Complete sentences
  - b. Paragraph 1 understandable to those not familiar with the topic, no jargon
  - c. Paragraph 2 sample values
  - d. Paragraph 3 context, cautions, standard uses or misuses
  - e. Paragraph 4 See: (list links to other Data Cookbook definitions or other web sites)
  - f. Paragraph 5 Keywords: (other words someone might search on for this element)
  - g. Paragraph 6 comments regarding permission, security limitations, if applicable

See: <u>Graduation Rate</u> Keywords: graduate, degrees conferred, on-time

- 4. Enter Source, Classification, Responsible Office, skip to Functional Area and enter
- 5. Hit **SAVE** to save your work. Hit **Submit** to move definition to the next stage in Workflow. Others will not be able to edit until Submit is selected.
- 6. Workflow Steps: Drafting > Functional Area Review > Final Review > Approve (Final review and Approval by functional data owner)

If creating a <u>new version</u> of a definition, add text re: changes being made.

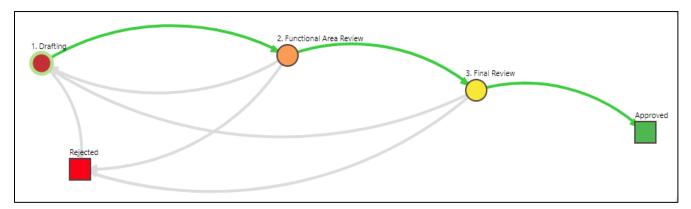
	story and Comments <sup>①</sup> <u>View History</u>		
1:	Approved (0 Comments) show/hide version details		
	Add a Comment:		
	changes being made	←	

- Race/Ethnicity, Student
- Race/Ethnicity, Employee

#### WORKFLOW

Definitions move from 'Drafting' to 'Functional Area Review' to 'Final Review" and 'Approved'.

Once definitions are ready to move from "Drafting', other functional area staff can assist in the 'Functional Area Review". Additional edits can be made. From there it moves to the functional data owner for a "Final Review" for accuracy, completeness, and adherence to standards. Additional edits can be made or the definition sent back to "Drafting". Once the functional data owner considers it complete, s/he hits the "Approve" button.



#### **CREATING A NEW DEFINITION**

#### Steps:

1. Hover over the **Definitions** tab and click on **Create a Definition** 

Home	Definitions	Specifications	Quality	Data Systen	ns Org	ganization	Commun	ity
Definitio		ions' terminology and def s technical definitions. Edit rove them.			Search:	0		>
Sort by: Select	Browse Definiti	ons	SE OPTIONS	only				
Filter by: Workflow definition -	Create a Defini	tion	owse by name ost recent first		Tag	<b>~</b>	Classification	~

2. Enter the information for a new definition based on the standards below:

Name	Classification
Functional definition	Responsible office
Source	Functional area

- 3. See the section on 'Standards for Creating a Functional Definition' at the end of this document for more detail.
- 4. To include links to an URL or to another Data Cookbook definition, use the button shown with an arrow.

Nev	v Defi	nition				
* Nar	me					
* Fun	ctional	definition	0		- E	
1=	:= de	÷≣ 99	B 7	U	5	<b>#</b>
5=	•=  =	···= //	- I	-		

Census, Student	
Create a New Version	
* Name 🕕	
Census, Student	
* Functional definition	
]= := :≢ :≢ ?? B I <u>U</u> S ∞ ⊞	
Best practice for report writers is to use census, or 'frozen', data to report on longitudinal tracking, peer reporting, statistical analysis, and retention.	ľ
See: [[ Census, Financial Aid ]] and <u>ODS Freeze Calendar</u> for Purdue West Lafayette census (and freeze) dates.	Ì
Keywords: freeze, FRZ, history, trends	

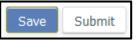
When saved, both will be clickable links as you you see in the Census, Student definition on the left.

To use an URL as an additional resource, use the LINK icon. Type common language such as 'ODS Freeze Calendar', and make that the link rather than just using the URL.

To link to another definition already in Data Cookbook, use double brackets around the [[definition name]].

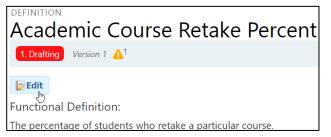
Census, Student	
1. Drafting Version 1 New version	
Functional Definition:	
Point of time that official data are captured for each academic period (summer, fall, spring). This includes enrollment, course registration, retention, instructional activity, schedule offering, demographics, and other student related information.	
The census event is typically done in the third week of fall and spring semesters and near the end of summer semester. Data captured is referred to as 'frozen' data. Census dates may vary by campus.	I
Best practice for report writers is to use census, or 'frozen', data to report on longitudinal tracking, peer reporting, statistical analysis, and retention.	
See: Census, Financial Aid and ODS Freeze Calendar for Purdue West Lafayette census (and freeze) dates.	
Keywords: freeze, FRZ, history, trends.	

5. After entering the new definition, **Save** or **Submit** the information.



Save button: To save your work

Submit button: When the person who drafted the definition is ready for the review process to begin, select Submit.



Only the person who drafted the definition has the Edit button until they submit it to the Functional Area Review step.

### ADDING/REMOVING A COLLABORATOR

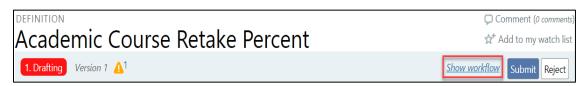
A collaborator may be added at either the DRAFTING or FUNCTIONAL AREA REVIEW steps in workflow.

- Comment the collaborator is able to provide comments on the definition
- Edit the collaborator is able to edit the definition
- Delegate User Role the collaborator has the same role as the editor

When adding a collaborator in the workflow, it is for that definition only. You will need to add the collaborator to each definition as needed.

#### Steps:

1. On the Edit definition window, click on Show Workflow.



2. With the Definition Workflow expanded, click on 🕒 icon next to Collaborators.



3. The Add Collaborator window will open. Determine who and role for the collaborator in this window.

Add Collaborator	Click on the <b>down arrow</b> and select the
Type or Select	individual to be added as a collaborator.
Comment •	Determine what the collaborator will be able to do with the definition.
Add optional note to collaborator	Add a comment to the collaborator
Add	

To remove the collaborator, click on Show Workflow to open workflow.

Click on the collaborator's name, under **Collaborators**, you want to remove and then click on **Remove Collaborator**.

COLLABORATORS: 🕂
Kendal Kosta-Mikel (commenter)

Collaborator		×
Kendal Kosta-Mikel profile kkostami@purdue.edu		
Comment 🗸		
Add optional note to	^	Update
contributor	$\sim$	
Remove Collaborator		

Once done with updating the definition and it is ready to move to the next stage, scroll to the <u>top of the page</u> and click on the **Submit** button.

#### ADDING AN ATTACHMENT (optional)

If there is a document that provides more information about a definition, it can be added as an attachment. In order to add a file, please hit the pencil icon on the right hand side of the box shown below, choose the file, add a description and hit Attach file and Done buttons.

Note: Attachments cannot be added to the Approved definitions. If a definition is Approved a new version must be created and the attachment added to it.

DEFINITION	🖵 Co	mment (0 comments)
Academic Course Retake Percent	☆* Ac	dd to my watch list
1. Drafting Version 1 A1	Show workflow	Submit Reject
<b>Functional Definition:</b>	B FUNCTIONAL AREAS	
The percentage of students who retake a particular course.	•• WORKFLOW Current Workflow	
See <u>Repeatable and non-repeatable courses</u>	At FUNCTIONAL DATA OWNERS	)
Other Information:	Definition Approval for Student	
source of definition: <a>(1)</a> <a>1</a> <a>1<!--</th--><td></td><td></td></a>		
CLASSIFICATION: 1 ( <u>RequiredSensitive</u>	No Synonyms	6
RESPONSIBLE OFFICE: Registrar	No Synonyms	
Quality Attributes () <u>NOT IMPLEMENTED AT THIS TIMI</u> No quality attributes defined	TAGS 1 LIMITED USAGE No Tags	Ø
Add a Quality Attribute	♠ ATTACHMENTS ①	

#### FUNCTIONAL AREA REVIEW of a DEFINITION

After a definition is created, edited if necessary, and the SUBMIT button is selected, it moves to the next stage, FUNCTIONAL AREA REVIEW. There, other(s) with a role for that functional area begin their review of the definition. They may make edits and consider it ready for the functional data owner to do a final review and approve. Or they also can send it back to Drafting and add a comment why it needs more work. They also can reject it indicating it is not a definition they believe is needed.

#### **Options to find Definition(s) Ready for Review**

- From an email received that a definition is ready to review, use link to definition embedded in email. OR
- Use Search box on Home tab or Search box on Browse Definitions tab, if you know the field name OR
- Go to Definition queue and use the cascading prompts as it is shown below:



1. Hover over the **Definitions** tab and click on **Definition Queue.** 

Home	Definitions	Specifications	Organization	Community
Definition Approva Filter by:	I Queue			
Definition Approval 🛛 🔻	Workflow definition - 🔻	Stages -	<ul> <li>Actions -</li> </ul>	<b>r</b>
Functional Area -	Data Systems - 🛛 🔻	Originator -	<ul> <li>Classification -</li> </ul>	•
Hide closed objects				
<ul> <li>Available for action by</li> </ul>	y me			

2. You can search the list of definitions under the **Filter by** section or by paging through the list.

#### Searching the List of Definitions:

- The top row of the search are cascading prompts. You must select a value in the first search box (Workflow type) to populate the next search box (Workflow definition). And you must select the Workflow definition select the Current Workflow:# at the top of the list
- Stages (Drafting, Functional Area Review, Final Review), can be used to narrow the Search
- The second row of the search you can select individually and should filter by Functional Area to narrow the search



- Hide closed objects: Check the box to limit to those awaiting further action.
- Available for action by me: Check the box to further limit.
- By clicking on the Name field or any of the columns, you can change the sort order
- Once you have narrowed down your selection, under the **Name** column, click on the definition you wish to edit. This will open the Definition window.
- Click the Edit button.



• Once the definition has been updated and the changes are ready to be saved, click the Update button at the bottom of the page to save the work. The definition may be edited again before moving to the next workflow step which is the Review Complete step. Once the 'Review Complete' is hit, you no longer can make edits as the next person in the review process has ownership.

Please hit "Back to Drafting", if you think definition needs more work.

Please hit "Reject", if you think the definition is no longer needed.

DEFINITION	Comment (0 comment
Actuals	☆ <sup>+</sup> Add to my watch lis
2. Functional Area Review Version 1 A1	Show workflow Review Complete Other Actions
🕞 Edit	FUNCTION Back to drafting
	Finance Reject

#### FINAL REVIEW AND APPROVAL OF WORKFLOW

The Functional Data Owner begins a final review for accuracy, completeness and adherence to standards.

Academic Grade, Student	□ Comment (0 comments)     ☆ <sup>+</sup> Add to my watch list
3. Final Review Version 1 🛕	Show workflow Approve Other Actions
<b>Functional Definition:</b>	📾 FUNCTIONAL AREAS 🚺 🧭
An evaluation of a student's coursework given by the instructor.	● WORKELOW ③

Options include 'Back to Drafting' if definition needs more work or "Reject" it indicating it is not a definition they believe is needed.

Academic Grade, Student		<ul> <li>Comment (0 comments)</li> <li>☆* Add to my watch list</li> </ul>
3. Final Review Version 1 A1	Show workflow App	prove Other Actions <b>V</b>
Edit		ack to Drafting eject

Once the Approve button is selected, definition will have a green Approved label and the definition version # will be also green when browsing the list of definitions.

DEFINITION	Comment (0 comments)
Academic Grade, Student	☆ <sup>+</sup> Add to my watch list
Approved Version 1 <u>New version</u>	Show workflow
Functional Definition: An evaluation of a student's coursework given by the instructor.	😥 FUNCTIONAL AREAS 🚺 🖉
Academic Grade, Student Source: 9.2 Ellucian Band	Version <b>1</b> of <b>1</b> Created by <u>Leslie M Rody</u> 08/19/2019 Approved by <u>Aylin Celtik</u> 07/21/2020
An evaluation of a student's coursework given by the instructor. E.g. A, A-, B, Betc	CLASSIFICATION: <u>Restricted</u> USED IN: <u>2 Specifications</u>

#### **NEW VERSION OF A DEFINITION**

Later, if additional edits are needed, a new version can be created and it will go through the workflow process again. Use the 'Add a Comment' field to document what edits created the need for a new version.

DEFINITION		
Assignment Type Code		
Approved Version 3 <u>New version</u>		
Functional Definition:		
Assignment type code indicates if an employee is an I (instructor) and/or S (supervisor) for an <u>academic course section</u> .		
History and Comments @ <u>View History</u>		
3 : Approved (0 Comments) show/hide version details		
Add a Comment:		
Show comments 🗆 Show system events		

#### STANDARDS FOR CREATING A FUNCTIONAL DEFINITION

A **functional definition** is a description of a particular *data element*. It contains:

- Functional definition business language, processes.
- Technical definition data system, time context, additional technical information.

Many definitions correspond directly to fields in the source system or reporting database(s). Others will be derived by combining multiple fields in some fashion. Still others are a calculation.

#### Definition Name

A **definition name** is a word or phrase representing a *data element*. It can be a field or group of concatenated fields in a database; a derived field; a calculation (i.e., grade point average, etc.); a management metric (i.e., retention rate, etc.).

#### Name Elements

Definition names should adhere to the following 3-part naming convention, separated by commas:

- 1. Data Element
- 2. Descriptor Further classifies the overarching data element. (Optional)
- 3. Functional Area (Optional)

*Functional Area is the official list of subject areas within Data Cookbook. Add if doing so delineates how different functional areas use the data element. List of functional areas in Appendix.* 

Data Element Only Examples:

- Hire Date
- Course

Data Element with Descriptor Examples:

- Employee
- Employee, Faculty
- Employee, Staff
- Credit Hours
- Credit Hours, Credits Attempted
- Credit Hours, Credits Earned

Data Element with Descriptor and Functional Area:

- Full Time Equivalent, IPEDS, Human Resources
- Full Time Equivalent, IPEDS, Student
- Retention, Four-Year Graduation Internal, Student
- Retention, Four-Year Graduation IPEDS, Student

#### Name Standards

- Use Title Case Capitalize the first letter of each word, with the exception of short words (e.g., a, the, by, for)
- Omit "*A*", "*An*", and "*The*" from the beginning of the name
- Avoid numbers and special symbols

Do NOT use underscores, hyphens, dashes (Parentheses are okay.) These characters may be ignored in Cookbook search and can turn into garbled text when exported. Use complete words. Avoid abbreviations. If a very common abbreviation is used, refer to list of abbreviation exceptions in the Appendix. Examples include:

- $\circ \quad \text{ID: Identifier} \\$
- FTE: Full-time Equivalent
- GPA: Grade Point Average
- URL: Uniform Resource locator
- Delete leading and trailing white spaces (can occur when cutting and pasting from other sources). Data Cookbook will treat "*Tuition Revenue*" and "*Tuition Revenue<space>*" as different definitions.

**Note:** Please also see Appendix D on page 19 for more information about the additional SAP Master Data definition naming standards.

#### Functional Definition – Multiple Paragraphs

The **functional definition** is the business use of the data element. It should provide uniqueness within a functional area, links to related definitions, examples or values as well as context/perspective that would enable understanding for a person who is unfamiliar with the data.

#### Writing a Functional Definition

Follow these general standards when writing the functional definition/business description:

- Use complete sentences and standard grammar
- Be concise, precise, and specific
- Use business, not technical language
- Words such as university, fall, spring will be lowercase
- Be as exhaustively descriptive as seems relevant
- Avoid emotive language, including persuasion
- Be candid, not sensational
- No part of the name of the data element being defined should be included in the first <u>sentence</u> of the definition (avoid circular references).
- Limited use of abbreviations is recommended. Define a term once and include the abbreviation in parentheses immediately after. For example, "Capacity Utilization Level (CUL)" or "Full-time Equivalent (FTE)."

Do NOT use underscores, hyphens, dashes (parentheses are okay). These characters may be ignored in Cookbook search and can turn into garbled text when exported. If copy/pasting from Excel, be aware of forced line breaks (when alt + enter is used in a cell instead of Excels wrap text function) this creates a hard line break in Cookbook and will cause the definition to split into multiple lines and cells when exported to CSV. It is best to turn off text wrap and copy the text from the Formula Bar.

Example of forced line breaks in Excel				
Participation standards against which to measure proportions of females and minorities in each job group in the				
University's workforce.				
In accordance with Department of Labor guidelines, the following factors are considered in developing an estimate of the	2			
availability of women and minorities for each job group:				
1. The percentage of minorities and women with requisite skills in the reasonable recruitment area. The	used here			
reasonable recruitment area is the geographical area from which the employer usually seeks or	(ALT+Enter)			
reasonably could seek employees to fill the positions in a job group.				
2. The percentage of minorities and women among those promotable, transferable, and trainable				
employees within the employer's organization.				
$f_x$ Participation standards against which to measure proportions of females and minorities in each job group in the Universit In accordance with Department of Labor guidelines, the following factors are considered in developing an estimate of the				
1. The percentage of minorities and women with requisite skills in the reasonable recruitment area. The	availability of women and minorities for each job group.			
reasonable recruitment area is the geographical area from which the employer usually seeks or	ppy text from the			
reasonably could seek employees to fill the positions in a job group.	Inction Bar not the cell			
2. The percentage of minorities and women among those promotable, transferable, and trainable				

- Special symbols may be used in a definition, but must be preceded by the name of the symbol followed by the symbol in parentheses. For example, "*Percentage of the difference between 100 percent (%) Occupancy and the...*"
- Avoid using jargon and highly technical details. Those are included in the technical definition.
- The first time you refer to a related data element definition, hyperlink to that definition. Use double brackets around the related element.

Ex. Graduation Rate [[Retention Rate, Student]] or Academic Year, Student [[Academic Period]]

• Deviation from these standards is allowed if adds to the ease or accuracy of understanding.

#### First paragraph – business definition, understandable, no jargon

Concise business explanation of the element, written in common language, for someone unfamiliar with the element. For example, the definition for "*Academic Period*" would appear as follows:

Period of time during which formal instruction occurs.

[NOTE: Depending upon how we use integration with Cognos/Tableau, the first sentence may be visible so needs to be clear and concise.]

#### Second paragraph – sample of valid values or reference to list of values

List examples of the valid values/descriptions. Describe how the data element is used. May include a hyperlink to the authoritative source of valid values.

List of definition values or validation table

• If there are only <u>10 values or fewer</u>, a list of those values will appear with the following heading:

A list of common <definition name> codes and descriptions are:

"Fiscal Year Period" displays as the fiscal year-quarter. Current values within the Finance/HR systems (SAP) are: 2016-03' for July, August, and September of 2016

"Academic Period" displays as the first four digits of the calendar year, <u>except for fall term</u> which is the subsequent year. The last two digits represent the semester. Current valid values within Student Systems (Banner) are:

'201930' represents summer 2019 '202010' represents fall 2019 '202020' represents spring 2020 Alternatively, if there are more than 10 values, or if the values change regularly, reference the validation table.

#### Third paragraph – context, cautions, standard uses or misuses

Additional information, such as cautions, context, common misinterpretations, historical changes in values or use, how it can be sorted or grouped. Also include information regarding other related data elements. If the term created has the same base term but a different term modifier or organization from another definition, refer to the similar term in the paragraph. Include the hyperlink to the similar term.

#### Fourth paragraph – See: Links to other related definitions

Please add links to other related Data Cookbook definitions. To link to another definition already in Data Cookbook, use double brackets around the definition name.

See: [[definition name]]

Census, Student	
Create a New Version	
* Name ①	
Census, Student	
* Functional definition ®	
Best practice for report writers is to use census, or 'frozen', data to report on longitudinal tracking, peer reporting, statistical analysis, and retention.	
See: [[ Census, Financial Aid ]] and <u>ODS Freeze Calendar</u> for Purdue West Lafayette census (and freeze) dates.	Ì
Keywords: freeze, FRZ, history, trends	ł

#### Fifth paragraph – Keywords: other words someone might use to search

Consider what other keywords someone less familiar with the topic might use to search for this element. Including these in the functional definition will allow a search to identify it as possible match.

Keywords: synonym1, synonym2

Home	Definitions	Specifications
		Acting As Administrator
DEFINITION		
Veteran, Stud	ent	
Approved Version 1 New	version	
Functional Definition: 🕕		
	l. The student record in	missions application or add it cludes military dependents
All aspects of veteran supp <u>Veteran Success Center</u> .	ort, services, and benef	its are managed by the
Keywords: GI, Yellow Ribbo	n, soldier, survivor, warı	rior, Army, Navy, Marines,
Coast Guard, Air Force, rese	erves.	

#### Sixth paragraph – Security, permissions (if applicable)

Comments regarding permission, security limitations if applicable.

This is the end of the functional definition.

#### Source of Definition

Source of the *definition*, as opposed to the source of the *data element*. The majority will use the default of 'Institutional Definition, indicating it is a Purdue definition.

Other options are external sources of definitions such as ICHE or IPEDS. Please choose one of the sources from the drop down menu, not create a new source by using the text box. If additional external sources are needed in the drop-down, please contact: Institutional Data Governance Program Manager at datagovernance@purdue.edu

#### Classification (Purdue-Required field)

Under the University's Data Classification and Governance Policy, Purdue University data will be reviewed on a periodic basis and classified to its use, sensitivity and importance to the University and in compliance with federal and/or state laws.

The three levels of data classification are: Public, Sensitive, and Restricted

- **Public** Information: open to the general public: defined as information with no existing local, national or international legal restrictions on access. Example: Course catalog
- Sensitive Information: access must be guarded due to proprietary, ethical or privacy considerations. This classification applies even though there may not be a civil statute requiring this protection. Example: Birth date, Ethnicity
- **Restricted** Information: legally protected by state or federal statutes, policies or regulations. This level also represents information that isn't legally protected, but for which the information owner has opted to restrict access. Example: Student's academic records (protected by FERPA), Social Security Number

#### Additional information can be found at:

Data Classification and Handling Procedures (https://www.purdue.edu/securepurdue/data-handling/index.php)

#### Personal Directory Information

#### (http://www.purdue.edu/registrar/currentStudents/students/personalDirectory.html)

The University is permitted to release certain information about a student without the student's expressed permission. This information is called Personal Directory Information and includes:

- Name
- E-mail address
- Local and home address and phone number
- College/school
- Program of study
- Classification
- Credit hour load
- Dates of attendance; degrees, awards, and honors received
- Participation in activities and sports
- Weight, height and position of athletic team members

Students may request in person, with photo identification, at the Office of the Registrar that all of their directory information be restricted. For these students, **NO INFORMATION** is released without the students' written consent.

#### Responsible Office

Office to contact for additional information. If additional offices are needed in the drop-down, please contact: Institutional Data Governance Program Manager at <u>datagovernance@purdue.edu</u>

#### Technical Table Name (Only for SAP Data Marts)

The name of the table in the Data System that the field originates in. This field is required for SAP Data Mart definitions. Not implemented for student data systems.

#### Technical Field Name (Only for SAP Data Marts)

Technical name in the Data System of the field. This field is required for SAP Data Mart Definitions. Not implemented for student data systems.

#### Data Type (Only for SAP Data Marts)

Indicates the format of the data and string length (if applicable). Examples include VARCHAR, DATE, or NUMBER. This field is required for SAP Data Mart Definitions. Not implemented for student data systems.

#### Security Level (Only for SAP Data Marts)

Indicates the Purdue Defined Security Role Required to Access this field in Cognos. This field is required for SAP Data Mart Definitions. Not been implemented for student data systems.

SCD (Slowly Changing Dimension) Type (Only for SAP Data Marts)

Type 1 – Old value overwritten, Type 2 - New additional record is created in order to maintain history.

#### Inactive Flag

Used to indicate archived content. Please choose "Yes" from the drop down menu if the definition is no longer populated.

#### Technical Definition (Only for SAP Data Marts)

Technical Definition part is **only used by the SAP side**; Finance, HR, Research (GM), and Administrative Operations functional areas. If you create a definition for other functional areas, please skip this section.

Please choose a data system from the dropdown menu. Time Context is not a required field, but the technical definition text box below is required. Please put N/A into the definition textbox to be able to save the definition.

Technical Definition () IMPLEMENTED for SAP Data Marts
Data System: 1) IMPLEMENTED for SAP Data Marts SAP - S4
O O Browse Data System
Time Context: 1 <u>NOT IMPLEMENTED AT THIS TIME</u>
]= :=   :=
N/A

#### Tags

A tag is used to quickly group definitions or specifications together for ease in searching. They are used as a filter on the browse page. They may be shared by multiple definitions. For example, hit the Definitions tab and from the Tag filter and choose "COVID-19" to see all Covid-19 related definitions with "Covid-19" tag. <u>Currently, we are only using Management Dashboards, Data Digest Dashboards, and Covid-19 tags</u>. Please contact Institutional Data Governance Program Manager at <u>datagovernance@purdue.edu</u> if you need another tag.

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 definitions), hit the + sign next to it and then hit "Done" button. Typing just the 'CO' will show COVID-19 below and it can be selected.

Definitions		
Sort by:	Display:	
Select V	Full Content ~	
Filter by:		
Workflow definition - V	nal Area 💙 Definition Source 💙 Data Systems 💙	Tag 🗸 🗸
		Tag COVID-19
		Data Digest Dashboard
		Management Dashboard

For more information about the Covid-19 standards and adding/deleting a tag, please see the Covid-19 Standards section on the next page.

COVID-19 Flag		□ Comment (0 comments) ★ On my watch list
Approved Version 1 <u>New version</u>		Show workflow
Functional Definition: The flag is set to Y if Proposal activities are focused on COVID-19 pandemic.	FUNCTIONAL AR Research	EAS 🛈 🖉
Other Information:	••• WORKFLOW Current Workflow	
SOURCE OF DEFINITION: ① <u>1 Institutional Definition</u>	A FUNCTIONAL DA Administrators Definition Approval for	
RESPONSIBLE OFFICE: Sponsored Programs	SYNONYMS No Synonyms	Ø
Quality Attributes () <u>NOT IMPLEMENTED AT THIS TIME</u> No quality attributes defined	TAGS () <u>Usage</u> COVID-19	Ø
Technical Definitions () NOT IMPLEMENTED AT THIS TIME		

#### **Functional Areas**

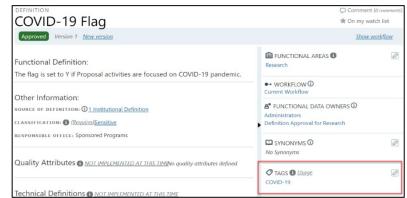
Functional subject area(s) of the data element. If unsure of the functional area, use Unassigned. If additional functional areas are needed in the drop-down, please contact Institutional Data Governance Program Manager at <a href="mailto:datagovernance@purdue.edu">datagovernance@purdue.edu</a>.

#### Synonyms

Synonyms, once used, cannot be used as a Definition Name later. The same functionality is met by using Keywords: in the definition. Any word in the Definition Name or anywhere in the functional definition will be found when a search is done. If there is a need for either of these, please contact datagovernance@purdue.edu

#### **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 definitions. We need to make sure the definitions follow these standards to ensure that a user can easily see all COVID-19 related definitions by using search and tag features in the Data Cookbook.



Add a tag of 'COVID-19' for the definition 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 definitions. For example, hit the Definitions tab and from the Tag filter and choose "COVID-19" to see all COVID-19 related definitions with that tag. You can add the tag at any stage in the workflow.

<u>Adding a Tag:</u> 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 (or 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 definitions. Otherwise, your definition will not show up when a user filter

down with the COVID-19 tag. <u>Currently, we are only using Management Dashboards, Data Digest</u> <u>Dashboards, and Covid-19 tags</u>. Please do not create different tags.

✓ TAGS Usage No Tags	<b>F</b>
	•
	Done

TAGS D Usage	
No Tags	
СО	0
COVID-19	
Ð	Done

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

COVID-19	
	Done

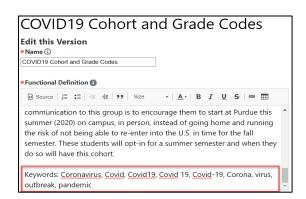
TAGS 🗈 <u>Usage</u>	
COVID-19	×
	•
	Done

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

🗸 TAGS 🚺 <u>Usage</u>	
COVID-19	Ť.
	0
	Done

• Add following keywords at the end of the definition. 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



## Appendices

A. Glossa	ary of Terms
Approver	Functional data owner role responsible for review and approval to put a data
Approver	element, specification into production
	Displays the level of sensitivity (public, sensitive, restricted). These were
	developed by Purdue data stewards.
Data	Additional information can be found at:
Classification	Data Classification and Handling Procedures
	(https://www.purdue.edu/securepurdue/data-handling/index.php)
	Personal Directory Information
	(http://www.purdue.edu/registrar/currentStudents/students/personalDirectory.html)
Data System	Not implemented at this time for Definition creation. Will be used when
Data System	Specifications are entered.
Editor	Role with access to edit a definition or specification.
Functional	Subject area
Area	Subject area
Functional	Multi-paragraph explanation, conceptual description, list of values, cautions
Definition	and any specific access requirements re: a data element.
Functional	Person (or designee) responsible for data in that functional/subject area.
Data Owner	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
СМс	Construction Manager as Constructor
СРМ	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.

## Master Data Definition Naming Standards – used for SAP Data Marts (For FI, HR, AO, Research (GM) only)

Parts that are labeled in yellow can be modified depending on what is being displayed in the field.

Field	Definition
Changed By / Modified By	This field Identifies the (PUID/Person ID/user ID/career account/PERNR/Name) of the person who changed/modified the object/record. See also [[Changed on Date]]
Changed On Date / Modified on Date	This field indicates the date the object/record was last modified. See Also [[Changed By]].
Created By	This field identifies the (PUID/Person ID/user ID/career account/PERNR/Name) of the person who created the object/record. See also [[Created on Date]], [[Changed By]]
Created On Date	This field indicates the date the object/record was created. See also [[Created By]], [[Changed on Date]]
Valid From Date / Effective Date / Start Date	This field indicates first day the object/record is valid from.
Valid To Date / End Date	This field indicates the date the object/record is valid to.

D. Additional Attributes		
Responsible Office	Area within the University responsible for this data	Choose from the
	definition. Office to contact for additional information.	drop down menu
	For SAP Data Mart only. The name of the table in the Data	
Technical Table	System that the field originates in. This field is required for	Text box
Name	SAP Data Mart definitions. Not implemented for student	Text DOX
	data systems.	
	For SAP Data Mart only. Technical name in the Data System	
Technical Field Name	of the field. This field is required for SAP Data Mart	Text box
	Definitions. Not implemented for student data systems.	

Dimension) Type Inactive Flag	<ul> <li>2 - New additional record is created.</li> <li>Used to indicate an archived definition. Choose "Yes" from the drop down menu if the definition is no longer populated.</li> </ul>	drop down menu Choose from the drop down menu
SCD (Slowly Changing	For SAP Data Mart only. Type 1 – Old value overwritten, Type	Choose from the
Security Level	For SAP Data Mart only. Indicates the Purdue Defined Security Role Required to Access this field in Cognos. This field is required for SAP Data Mart Definitions. Not been implemented for student data systems.	Choose from the drop down menu
Data Type	For SAP Data Mart only. Indicates the format of the data and string length (if applicable). Examples include VARCHAR, DATE, or NUMBER. This field is required for SAP Data Mart Definitions. Not implemented for student data systems.	Text box