Quick Tutorial on the Data Cookbook

Logging In
Using your browser, go to: http://________.datacookbook.com

Use the following credentials to log in:
Login: __________
Password: __________

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
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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.
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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
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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

**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

Fill out the Name, Functional Definition and 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
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**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.
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Bulk Copy from the Community

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

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

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”: