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Purdue University - Data Cookbook

Specifications and Collections
Final Review and Approval

June 2021

The Final Review and Approval Steps are key in ensuring quality specs/collections.

If the spec/collection is COVID-19 related, ensure the COVID-19 tag and keywords are on it.
See page 4 for more information.

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

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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.

This document is a short version of our complete specs standards documentation for the approvers of a spec/collection. Please see the complete documentation of **Creators Specifications - Standards** (https://www.purdue.edu/idata/Services/Data_Governance/DataCookBook.php)
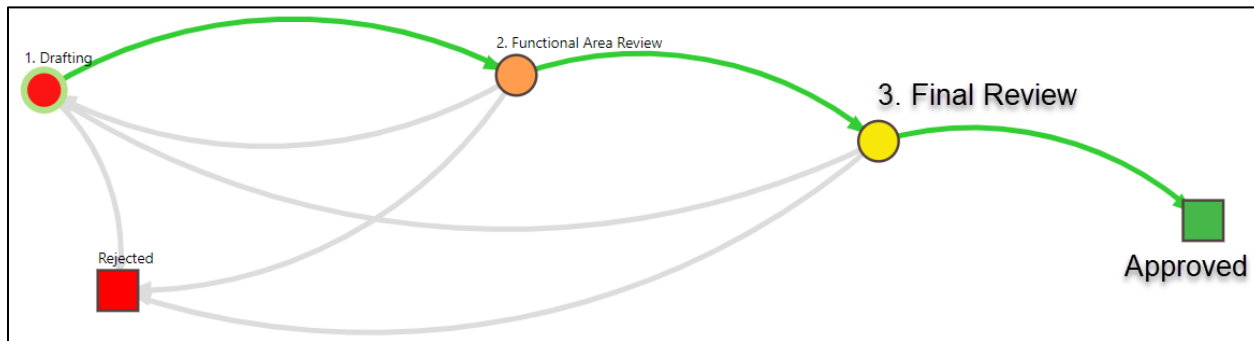
WORKFLOWS OF SPECS AND COLLECTIONS

- Specifications move from 'Drafting' to 'Functional Area Review' to 'Final Review' and 'Approved'.

Once specifications are drafted and the functional area review is complete, they move to the report/dashboard owner for a "Final Review" for accuracy, completeness, and adherence to standards.

Additional edits can be made OR the specs sent back to "Drafting" for the original creator to make edits. A comment box appears when a specification moves from one stage to another. If the specification is sent back to drafting, the Reviewer/Approver is able to add verbiage about the edits needed.

Once the report/dashboard owner considers it complete, they hit the "Approve" button.


- Collections move from 'Proposing' to 'Under Development' (Functional Area Review), to 'Final Review', and 'Approved'.

Once collections are drafted and the functional area review (Under Development stage) is complete, they move to the collection owner for a "Final Review" for accuracy, completeness, and adherence to standards.

Additional edits can be made OR the collection sent back to "Proposing' for the original creator to make edits. A comment box appears when a collection moves from one stage to another. If the collection is sent back to proposing, the Reviewer/Approver is able to add verbiage about the edits needed.

Once the collection owner considers it complete, they hit the "Approve" button.
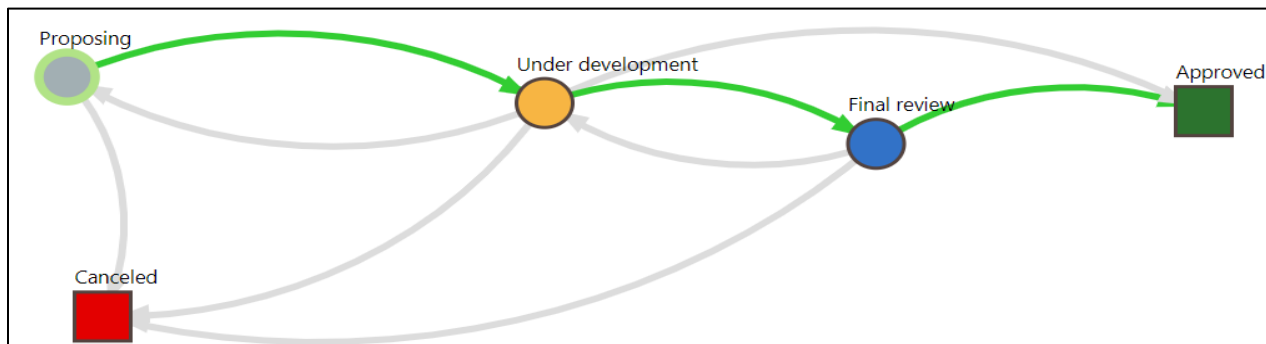
OPTIONS TO FIND SPECIFICATIONS/COLLECTIONS READY FOR REVIEW

1) If you received an email message that a specification/collection is ready to review, use the link embedded in the email. Automated email notices from Data Cookbook are sometimes routed to spam filters. Please be sure to check your spam filter for any trapped emails.

2) Click on the "Specifications" tab and then use the "Search" box, if you know the specification name. For Collections hit "Browse Collections" under the "Specifications" tab and then use the search box.

3) **(Recommended)** Go to the Specification/Collection Approval Queue and use the filters by following the instructions below:

- Hover over the **Specifications** tab and select **Specification Queue/Collection Queue:**
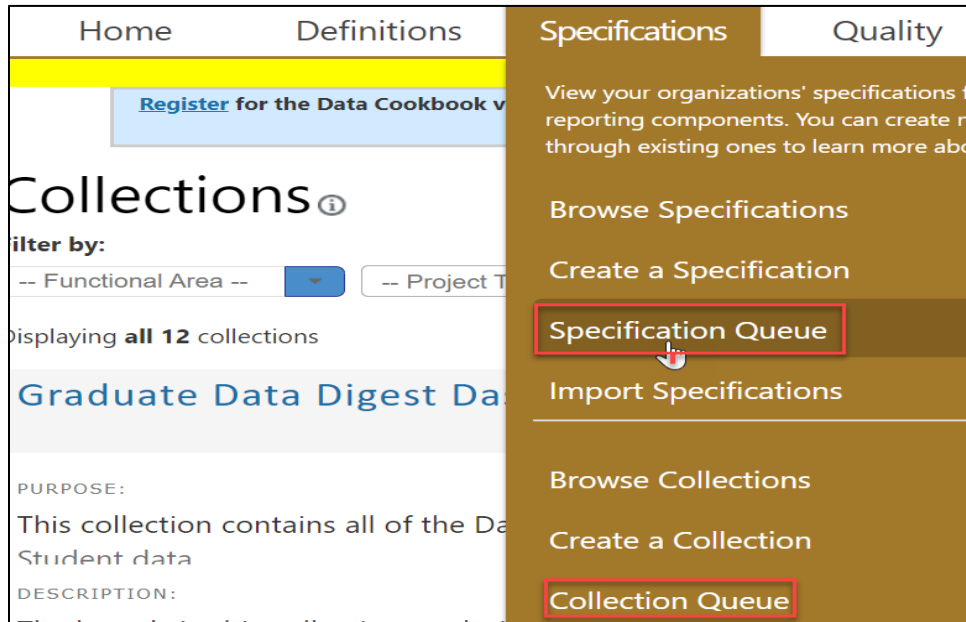
- Then, you can narrow down the specifications/collections by using the filters under the Specification Approval Queue or Collection Approval Queue. See the instructions below.
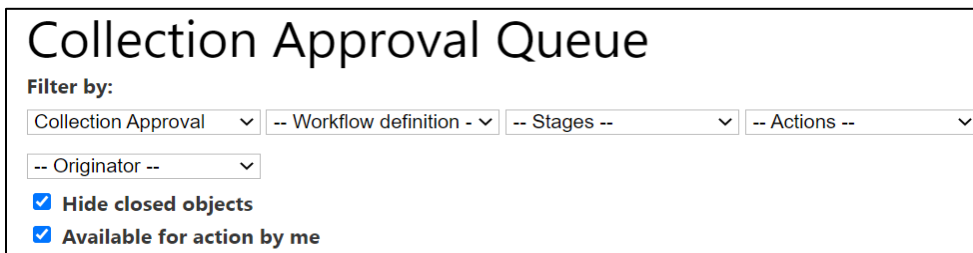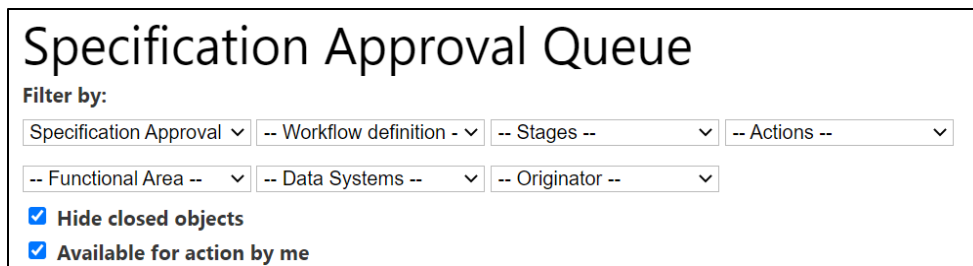
SEARCHING IN THE LIST OF SPECIFICATIONS/COLLECTIONS

Choose the "Specification Approval" from the Workflow type dropdown menu. And then it will open up a functional area filter where you can filter by the Functional Area to narrow the search. By clicking on the Name field or any of the columns, you can sort the specifications by name.

For collections, you can choose the name of the person who drafted the collection in the Originator drop down menu. By clicking on the Name field or any of the columns, you can sort the collections by name.

EDITING THE SPECIFICATIONS/COLLECTIONS

Once you have narrowed down your selection, under the "Name" column, click on the name of the specification/collection you wish to edit/update/approve. This will open the Specification/Collection window. The Report/Dashboard/Collection Owner begins a final review for accuracy, completeness and adherence to standards. If you need to edit the specification/collection, click on the **Edit** button.

Once the specification/collection has been edited and the changes are ready to be saved, click the Update/Save button at the bottom of the page to save the work.

APPROVAL OF WORKFLOW

Specifications: Options include 'Approve', 'Back to Drafting', and 'Reject'.

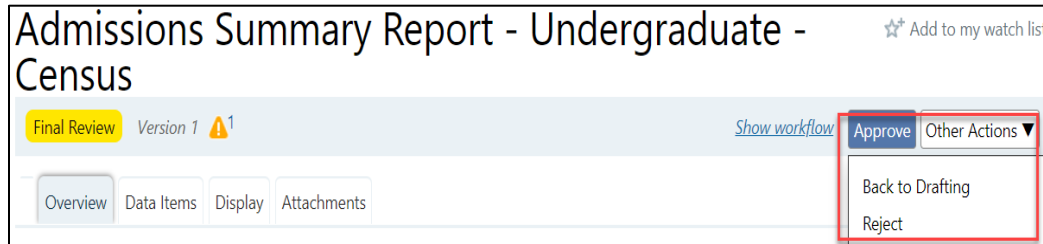➢ Hit 'Approve' if you believe the spec is accurate, complete and adheres to standards.
➢ Hit 'Back to Drafting', if you believe the spec needs editing before it is approved. Please make sure you add a comment that explains why it needs more work. A comment box will open up when you hit that button.
➢ Hit 'Reject', only if you believe the spec is not needed any more.

Collections: Options include "Approve", "Cancel", and "Send back to development".

➢ Hit 'Approve' if you believe the collection is accurate, complete and adheres to standards.
➢ Hit 'Send back to development', if you believe the collection needs editing before it is approved. Please make sure you add a comment that explains why it needs more work. A comment box will open up when you hit that button.
➢ Hit 'Cancel', only if you believe the collection is not needed any more.
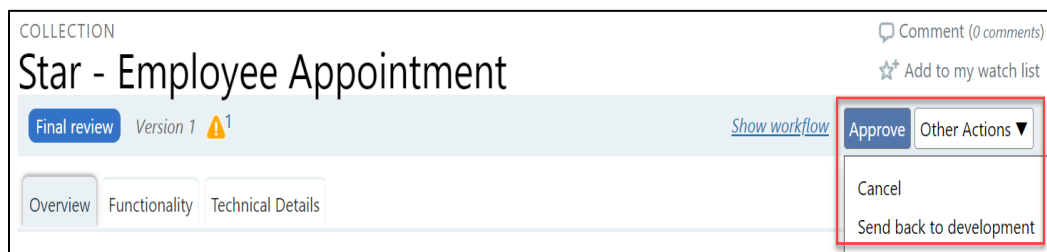
Tip: If you have so many specs/collections in your approval queue, it would be better if you open each spec/collection in another tab from your queue page, then approve that spec/collection and close that tab. Your approval queue will stay the same in the first tab, so you can open the second spec/collection in your queue in another tab. This way you do not need to wait your queue to be loaded every time you approve a spec/collection and you will approve them faster. You can refresh your approval queue page from time to time.

CHECKING THE COVID-19 TAG and KEYWORDS

1) Tags are searchable words and they help a user to see a group of specs/collections. For example, if a user filters down by the COVID-19 tag, user can see all COVID-19 related specs/collections. In order to make sure all COVID-19 related specs/collections have COVID-19 tag, please check the tag before approving a spec/collection. You can see the tag on the side bar of the spec/collection as it is shown below. If it is missing and need to add a tag, please hit the pencil icon on the upper right corner of the tags box as shown below.

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 (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 specs/collections. Otherwise, your spec/collection will not show up when a user filter down with the COVID-19 tag.
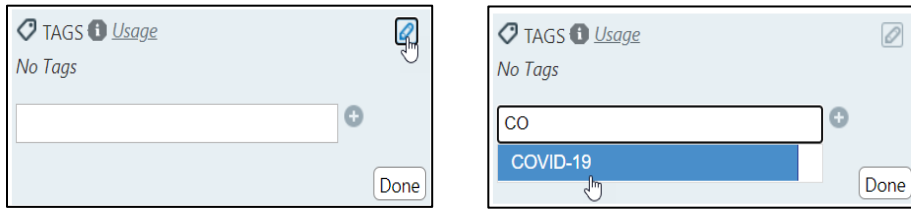
Then hit the + sign next to it and "Done" button.
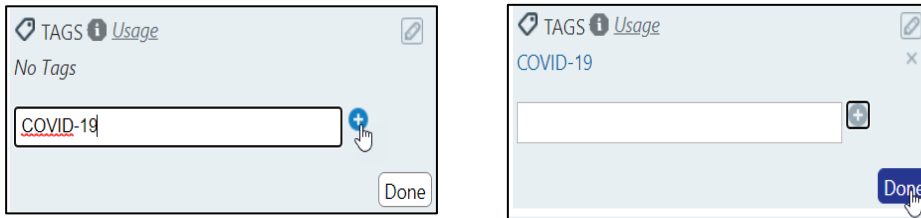
Removing a Tag: Hit the X button next to the tag below the pencil sign.
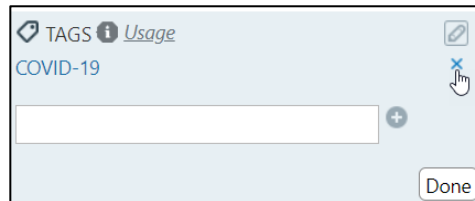
2) Make sure that Covid-19 related specs/collections have all the keywords listed below. If the spec/collection is Covid-19 related and does not have any keyword, please hit the edit button (below the spec name) and copy/paste the following list of keywords at the end of spec/collection description/purpose.

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