Digital Measures
Training Manual

- Custom Report Testing -
Report Testing – Digital Measures

After Digital Measures (DM) builds a custom report it is necessary to test the custom report for accuracy. This is done by entering test data into the fields used for selection criteria and the fields displayed on the report. The goal is to:

- locate any missing/incorrect data in the report
- locate the source of missing/incorrect data by comparing the report map with the test data in data fields
- define the causes, which include: test data entry error or erroneous report map**
- create “Data Entry Guide” for the report being tested

Please note that there are three categories of screens that will impact the report testing depending on which of these three categories of screens a report pulls its data. The three categories are:

1. **Data import only** (no modifiable fields) – New activity entries are entered only from other sources, cannot be manually entered and cannot be modified once loaded. Screen names include: “Workload Information”, “Workload DOE Effort Detail”, “UK Graduate Faculty Appointments.”

2. **Data import with modifiable data fields** – New activity entries are entered only from other sources, but the screen includes modifiable data fields. Screens include: “Personal and Contact Information”, “Research (OSPA)”, “Scheduled Teaching”

3. **Data fields only** – New activity entries can be manually entered and modified once entered. The majority of these screens are of this category. Screens include: “Intellectual Contributions”, “Consulting”, “Presentations.”

The following procedures focus mostly on the *data field only* screen category. Be aware that when the report is generated there may be gaps in the data because the report may be trying to pull data from *data import* screens that do not have data loaded into them yet. For example, if a report includes data from the “Workload Information” screen, but the screen does not have any entries loaded into it, this section of the report will be blank.

Procedure:

1. Generate Report Map
2. Transfer report map fields into “Data Entry Guide”
3. Enter test data into DM
4. Generate report to check for errors

**Report map** – Defines the selection criteria for including data in various sections of a report. Often the criteria involve more than just the screen name/source and data field name. Status values or other qualifiers are often part of the selection and may be overlooked during data entry. For example, a report may have a selection for listing *published* journal articles. In this case, the “Current Status” field on the “Intellectual Contributions” details screen must have the value “Published” for an item to be included.
1. Generate Report Map

The first step is to print out a report map to see which data fields are included in the report. Below illustrates the three steps to generate the report map:

This is an example of a report map for a report called “Intellectual Contributions.” It shows the name of the screen and each data field from which the data will be pulled. Add a text-bubble for selection criteria and point to Current Status.
2. **Transfer report map fields into the college “Data Entry Guide”** – Although the main goal is to ensure that a custom report is properly built, the “Data Entry Guide” should be updated if necessary during the testing process.

The “Data Entry Guide” lists all data fields that are required entry for college and institutional reports. The college data entry guide is started from a template provided by the DM team which includes the fields that are displayed on the UK standard CV and other institutional reporting.

When identifying fields for testing a report, make sure that the fields are included in the college data entry guide. Using the example above for an “Intellectual Contributions Report”, the Intellectual Contributions row of the “Data Entry Guide” would look like this:

<table>
<thead>
<tr>
<th>DM Screen</th>
<th>Purpose</th>
<th>Required Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Intellectual Contributions</strong></td>
<td>CV and merit review report</td>
<td>Required fields:</td>
</tr>
<tr>
<td><strong>Written publications such as books, book chapters, journal articles, and conference proceedings. Other intellectual contributions such as software or video tapes.</strong></td>
<td>*Contribution Type or Explanation of other</td>
<td>*Country of Focus of Contribution (if international)</td>
</tr>
<tr>
<td></td>
<td>*Current Status</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Title of Contribution</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Authors (Select Persons at UK for record sharing)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Editors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Student contributors (UK required)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Components of bibliographic description (volume, issue number, page numbers, etc.)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Audience of Circulation / Publication Scope</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Was this peer-reviewed/refereed?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Date Published</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date Submitted (required if in submitted status)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date Accepted (required if in accepted status)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Engagement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*UK required: published contributions with international scope OR categorized as engagement OR having undergraduate student involvement.</td>
<td></td>
</tr>
</tbody>
</table>
3. **Enter test data into DM** – Using the updated “Data Entry Guide”, for each required data field, test data must be entered. (Remember: this is only for screens that have modifiable data fields.) There are two types of data fields:

1) *drop-down list* (this provides a list that the user chooses from)

2) *free-form data field* (this allows for free-form text to be entered)

So, for each type of data field, test data must be entered:

*Drop-down list* – select the required criteria as noted in the report map (e.g. the example above would be “Published”)

*Free-form data field* – enter the word TEST and the name of the data field (e.g. as illustrated below, in the “Editors” data field, type: TEST Editors)
4. **Generate report to check for errors** - Check report to ensure that the specified data fields are populated. (Remember: there may be gaps in the data because the report may be trying to pull data from data import screens that do not have data loaded into them yet.)

Here’s how to run a custom report:

![Image of report creation process]

1st: Click on “Rapid Reports” tab at bottom of the screen
2nd: Select the type of report from the drop-down list
3rd: Select Start and End Dates
4th: Click “Run Report”

Here’s an example of test data in a report:

![Image of report content]

**Intellectual Contributions**
University of Kentucky
June 30, 1990 - December 31, 2010

**Journal Articles**

Journal Article (Published)

Doc J. (1999), TEST title of contribution. TEST Journal/Publisher/Proceedings. Publisher, TEST Volume (TEST Issue Number), TEST Page numbers. TEST Web Address