Digital Measures Training Manual

-Reports II-
(How to Run a Report)
Reports: How to run a report

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Introduction to Reports

Digital Measures provides powerful reporting that is customizable to fit your needs. The campus Digital Measures administrators – at the university, college and department levels – can generate reports on the activities of the faculty for whom they have access. Individual users/faculty can generate reports on their own data. Users can easily and quickly run reports for many of their reporting requirements,

There are two methods for generating reports that a user can choose depending on their needs: *Ad hoc reports* and *Custom reports*.

- *Ad hoc reports* allow for any data field to be included in a table-formatted report (i.e. you can run a single-instance report and pick what to include in the report: which data, which users and which dates.)

- *Custom reports* are based on established templates, pre-designed to include specific data fields and present them in a predetermined (customized) format. You can choose from several report templates including: CVs, Merit Review report and Publication report. (See: Reports I “How they work” for more details)
Ad Hoc Reports

Begin by clicking on “Run Ad Hoc Reports” in the left menu.

After selecting “Run Ad Hoc Reports” from the left menu, you will see the “Create a Report” screen. This screen is where you set the parameters for your Ad Hoc Report in eight easy steps.
Step 1: “Select the instrument to use” – Select “Activities Database”

Step 2: “Select the date range to use” - Select the range of dates for the information you wish to include in your report. (If you wish to include all dates for which you have data, select “All Dates.”)

```
Select the date range to use.  More Information >>

2
Start Date: Jan 01 2009
End Date: Dec 31 2009

☑ All Dates
```

Step 3: “Select the data to include” – The default behavior includes “All data” in the report. If you want to choose the data in the report select the button “Only include items checked below.”

- **All data** – Select this if you intend to run a report that includes ALL possible data fields. (Note: this will be a lengthy report)

- **Only include items checked below** – Select this if you intend to run a report that includes only specific data fields.

  a. By selecting the “Only include items checked below” option a pop-up menu appears allowing you to make your data field selection.
b. Select the data items you want to include. When you select a top-level item, all items under it are selected. To select a sub-item, select the plus sign (+) next to the heading to expand the list, then select the item. Select the minus sign (-) to hide the list again. (The example below shows sub-items for “Education.”)

c. After you’ve completed your selection, click “save” at the bottom of the screen.

d. You will see a summary of the data you selected in step 3:
Step 4: “Select how the data should be organized” – The data in the report can be organized by unit, such as college or department, or by individual. (e.g. if you select “department” from the list, the report will be grouped for each department that you have selected.)

Step 5: “Select who to include” – By default, all enabled users are included in your report.

- To limit your report to certain users or groups, select “Click here” to open the “Select whose data to include” pop-up window.

- Select whose data to include – In a pop up window you can select to include particular individuals or all individuals in a particular college or department. If colleges, departments, and individual users are selected, these selections function as “and” options, and the report will include all selections made. (Note: be sure to select the “Save” button after making selection.)

- You have the option to include enabled, disabled or both enabled and disabled users in your report.

Step 6: “Select the file format” – Your Ad Hoc Report can be generated in a variety of formats: Microsoft Word; Adobe PDF; HTML; Raw Data, Comma-Delimited; and Raw Data, XML. Choosing Raw Data, Comma-Delimited or Raw Data, XML will enable you to use the exported data in other data systems, but will not be very human-readable. The default format is Microsoft Word.

Step 7: “Select the orientation and paper size” – Your Ad Hoc Report can be generated several formats, including US Letter and A4 sizes, and portrait and landscape orientations

Next: Click “Continue” at the bottom of the screen
In the next screen,

1. Review the choices for your report listed in the box at the top. To change one of your choices, select “<Change>” next to the choice, make your changes in the resulting pop-up, and then select “Save.”

<table>
<thead>
<tr>
<th>The parameters you have selected:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range</td>
</tr>
<tr>
<td>Data</td>
</tr>
<tr>
<td>Organize By</td>
</tr>
<tr>
<td>People</td>
</tr>
<tr>
<td>Format</td>
</tr>
<tr>
<td>Orientation</td>
</tr>
</tbody>
</table>

2. Choose the report options. The content of these options is based on your prior choices.

3. Select Build Report. Your report will be generated and you will be prompted to either open it or save it locally. (If you instead receive a warning message stating that you have exceeded the 20,000 record limit, please revise your report selections to include a narrower range of data.)
Below is an example of an Ad Hoc Report from the “Presentations” screen in Word format, portrait orientation with the criteria:

- Screen: Presentations
- Data Fields: Conference/Meeting Name, Presentation Title, Date

<table>
<thead>
<tr>
<th>User</th>
<th>Conference/Meeting Name</th>
<th>Presentation Title</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abshire, Demetrius A. daabish2</td>
<td>Southern Nursing Research Society Annual Conference</td>
<td>Factors related to cardiovascular health in young adult college males</td>
<td>2010</td>
</tr>
<tr>
<td>Abshire, Demetrius A. daabish2</td>
<td>University of Kentucky College of Nursing Student Scholarship Showcase</td>
<td>Cardiovascular health beliefs of young adult males in college</td>
<td>2009</td>
</tr>
<tr>
<td>Abshire, Demetrius A. daabish2</td>
<td>University of Kentucky Interdisciplinary Conference</td>
<td>Cardiovascular health beliefs of young adult males in college</td>
<td>2009</td>
</tr>
<tr>
<td>Anderson, Debra O. danders</td>
<td>10th European Conference on Traumatic Stress</td>
<td>The Influence of Gang Violence on Adolescents' Mental Health</td>
<td>2009</td>
</tr>
<tr>
<td>Anderson, Debra O. danders</td>
<td></td>
<td>Adolescent boys' perceptions of gangs and gang violence</td>
<td>2009</td>
</tr>
<tr>
<td>Anderson, Debra O. danders</td>
<td>Emerging Leaders in Public Health Nursing: Mentorship and Graduate Education</td>
<td></td>
<td>2009</td>
</tr>
</tbody>
</table>
Custom Reports

There are two ways to run a custom report, either by selecting “Run Custom Reports” in the left menu, or by selecting the “Rapid Reports” tab at the bottom of the screen.

**Left Menu: Click on “Run Custom Reports”**

After selecting “Run Custom Reports” from the left menu, you will see the “Run a Report” screen. This screen is where you choose which custom report to run and set the parameters for your report in five easy steps.
Step 1: “Select the report to run” – Click on the drop-down list of custom reports. Here you will find base reports that come with Digital Measures as well as custom reports that your unit has created. The following is a list of “out-of-the-box” reports in Digital Measures:

- Academic Degrees Earned
- Awards and Honors
- Birthday Report by Month
- Contracts, Grants and Sponsored Research by Faculty
- Creative Works by Faculty
- Editorial and Review Activities by Faculty
- Faculty/Staff Directory
- General Service by Faculty
- Intellectual Contributions by Faculty
- Presentations by Faculty
- Scheduled Teaching by Faculty
- Vita

Click “Select report” after choosing a report from the drop-down list

Step 2: “Select the date range to use” – Select the date range for the information you wish to include in your report. (A warning will appear if you attempt to create a report with an end date before the report’s start date.)
**Step 3: “Select who to include”** – The default behavior is to include all enabled user accounts in a report. If you would like to limit your report to include only selected users, select “Click here” in step 3 to open the “Select who to include” page in a pop-up window. If colleges, departments, and individual users are selected, these selections function in as “and” options, and the report will include all selections made. Digital Measures uses the user attributes (e.g., college, department, etc.) in users’ most recent Administrative Data - Yearly Data records (including records in the future) to determine who should be included.

![Select who to include page]

a. Select the headings to show or hide the groups and then select the ones that you want to include in your report.

b. Select “All” next to a heading to select all items under it. Select “None” next to a heading to clear all items under it.

c. Select “Save” at the bottom of the screen to save your selections and return to the Create a Report screen.

d. You have the option to include enabled, disabled or both enabled and disabled users in your report. The Create a Report screen will show the individuals you selected to include in your report under step 5.

**Step 4: “Select the file format”** - The default options are Microsoft Word, Adobe PDF and HTML.

**Step 5: “Select the page size”** - US Letter and A4 sizes

**Next:** Click “Build report” at the bottom of the screen

Below is an example of a “Presentations by Faculty” custom report:
Rapid Reports: Rapid Reports gives you a way to quickly and easily run reports on your data in the system. By allowing you to run reports from the same screens into which you enter your data, Rapid Reports allows you to easily see the effect the data you enter have on your reports.