.:: Digital Measures

Activity Insight Administrator's Guide

Updated April 2014

ActivityInsight
Showcase your faculty.

Chapter 7: Reporting on Your Data

Overview of Reporting

Over the years, we have learned that success with Activity Insight requires that you capture your faculty's teaching, research, and service activities once, and then use the system to prepare many outputs.

Activity Insight provides two methods for generating reports: **Run Ad Hoc Reports** and **Run Custom Reports**. These powerful reporting tools enable you to run reports that fit your campus's exact needs. Activity Insight Administrators – at the campus, college and department levels – can generate reports on the activities of the users for whom they have access. Faculty users can generate reports on their own data.

With Activity Insight, your campus can build and run custom reports quickly and easily for many of its requirements, such as:

- Personnel reviews, including annual activity reports, promotion and tenure documents, and standardized vita
- Planning, including program, departmental and course-embedded assessments, and institutional research and analysis
- Professional and regional accreditation
- Media requests
- System and state reports
- Other custom reports created to meet your campus's needs

Leveraging the **Run Ad Hoc Reports** utility enables you to search and analyze the information your users have stored in Activity Insight to find answers to key campus questions.

> **Note:** Both *ad hoc* and custom reports will only include data stored within Activity Insight. If certain fields or screens do not contain data, a report run for those fields or screens will be blank.

Running Ad Hoc Reports

The **Run Ad Hoc Reports** utility enables you to create reports on the fly from your campus's data, whether campus-wide or on particular colleges/schools, departments, individuals, or groups. You pick what to include in the report: which data, which users, and which dates. Then Activity Insight creates a report customized to your requirements.

You can use *ad hoc* reports as a starting point for detailed analysis of the raw data in Activity Insight. An *ad hoc* report can be flexible enough to meet a wide variety of needs. Common use cases for this type of analysis are:

- To compare a user's activity records against the criteria for a new or revised custom report to verify completeness or to troubleshoot an issue
- As a starting point for statistical analysis
- As a way to determine which faculty have areas of expertise that qualify them for particular opportunities

If you find yourself repeatedly running the same *ad hoc* report, consider submitting a Report Setup work request to Digital Measures to create a new report template based on the parameters selected for your *ad hoc* report. See "Submitting Report Setup Work Requests" in *Chapter 8: Managing Work Requests* for more information.

As you consider how you leverage **Run Ad Hoc Reports** on your campus, keep in mind that this utility includes an option, **Show Hidden Data**, which enables you to choose whether you want a set of users to have reporting access to hidden data using **Run Ad Hoc Reports**. See "Screen, Field and Data Settings" in *Chapter 6: Customizing Screens and Fields* for more information on hidden fields. For more information on how this utility applies the **Show Hidden Data** option, see "Security Role Permissions" in *Chapter 4: Managing Security Roles.*

> **Note:** You can only run reports on users' data for which you have access.

Running an Ad Hoc Report

▸ **To run an Ad Hoc Report:**

1.	In Activity Insight, select **Run Ad Hoc Reports** in the Left-Hand Menu.

2.	In **Step 1**, select the instrument from which you will generate the report.

3.	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**.

*The **Run Ad Hoc Reports** page showing a selection of **All Dates**.*

> **Note:** All reports, by default, will include records that overlap with the report date range selected at run time as well as any records that are undated.

4   The default behavior includes all data in the report. To include a subset of the Activity Insight data, select **Click here** in **Step 3** to open the **Select data to include** pop-up window.

> **Warning:** If you have disabled pop-ups, please enable them for DigitalMeasures.com. See your web browser's user guide for more information.

*The **Select data to include** pop-up window.*

5   In the pop-up window, select **Only include items checked below**.

6   Select the data items you want to include. When you select a top-level item, you automatically select all items under it as well.

    a   To select a sub-item, select the plus sign (⊞) next to the heading to expand the list. Then select the sub-item. Select the minus sign (⊟) to hide the list again.

> **Note:** If you have customized screens or fields by unit, you will find these customized screens or fields broken out from the **Common Items** list in the **Select data to include** pop-up. Be sure to review these unit-specific lists if you want to include such screens or fields in your report.

    b   Select **Save** at the bottom of the pop-up window to save your selections and return to the **Run Ad Hoc Reports** page.

Select data to include pop-up window showing *Save* button.

The **Create New Report** page will display what data are now included in the report under **Step 3**.
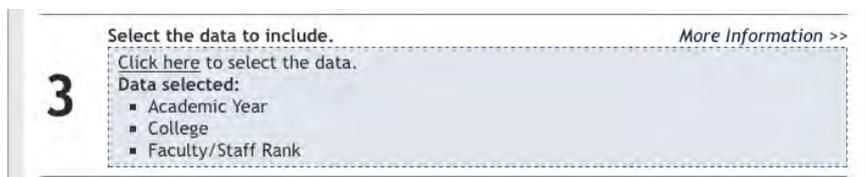
The *Run Ad Hoc Reports* page showing the data selected for a report.

7   **Step 4** enables you to search the data to which you have access for specific terms. Entering terms to search for into the **Specify text for which to search** box will limit the records in your *ad hoc* report to those containing the search term(s). This step is optional. For more information on searching the data in Activity Insight, see "Searching Using Run Ad Hoc Reports" below.

The **Run Ad Hoc Reports** *page showing the search terms "amino acids".*

8   Select an option for organizing the data in your report.

You can organize the data in the report by unit – such as college or department – or by individual. For example, if you select department from the list, we will group the report results by department, only including those that you selected.

The **Run Ad Hoc Reports** *page showing* **One report per Individual***.*

9   By default, all enabled users are included in your report. To limit your report to certain users or groups, select **Click here** in **Step 6** to open the **Select who to include** pop-up window.

    a   You can select to include specific 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.

    b   Activity Insight uses the user attributes – college, department, etc. – in users' most recent **Yearly Data** records, including records in the future, to determine who should be included.

> **Note:** If it would be helpful to select users to include in your reports based on an additional user attribute, like faculty/staff rank, Digital Measures can add this. Once added, this will be available as an additional **Select who to include** option in both **Run Ad Hoc Reports** and **Run Custom Reports**. To request this, submit a General work request.

Warning: If you have disabled pop-ups, please enable them for DigitalMeasures.com. See your web browser's user guide for more information.

Selecting who to include in an ad hoc report.

    c   Select the headings to expand the groups and then select the ones you want to include in your report.

    d   Select **all** next to a heading to select all items under it. Select **none** next to a heading to clear all items under it.

When you have completed your selections, select **Save** to save your selections and return to the **Run Ad Hoc Reports** page.

10   The **Run Ad Hoc Reports** page will show the individuals you selected to include in your report under **Step 6**.

*The **Run Ad Hoc Reports** page showing the people selected.*

You can also select to include enabled, disabled, or both enabled and disabled users in your report as part of this step.

11   Select the file format for your report from the drop-down list in **Step 7**.
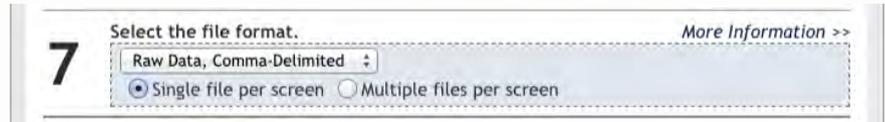
The *Run Ad Hoc Reports* page; *Raw Data, Comma-Delimited* file
format, with a single file produced per screen.

> **Note:** Digital Measures supports several other
> file formats, including 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. While the Raw Data,
> XML format is not very human-readable., using
> the Raw Data, Comma-Delimited format in
> conjunction with spreadsheet software such as
> Microsoft Excel can be a useful way to analyze
> the data your faculty members have stored for
> completeness or as part of troubleshooting
> other reports.
>
> Two variations of the Raw Data, Comma-
> Delimited format are supported – a single file
> per screen, or multiple files per screen. For
> screens with Dynamic Sub-Answers (DSAs), like
> **Intellectual Contributions** with the **Authors**
> DSA, selecting to generate a single file per
> screen will result in the DSA data being
> included as additional columns in the main file
> for that screen.
>
> Selecting to generate multiple files per screen
> will result in a main file per screen, and one
> additional file per DSA, containing just the data
> for that DSA.

12   Select the paper size and orientation for your report from the drop-down list in
Step 8.

Digital Measures supports several formats, including US Letter and A4 sizes,
and portrait and landscape orientations.

> **Note:** You will usually get better results using
> landscape orientation.

13   Select **Continue** at the bottom of the page.

14   In the next page, 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**.

Summary of the parameters selected for your ad hoc report.

15   In the lower sections, choose the report options. The content of these options is determined by your previous selections.

Sample report options.

16   Review your selections and select **Build Report**.

17   Activity Insight will build your report and prompt you 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.

> **Warning:** Changing the data in a report does not change the data inside the Activity Insight instrument. Use **Manage Your Activities** or **Manage Data** to make these changes.

Searching Using Run Ad Hoc Reports

Activity Insight enables you and your users to search the information that is stored within it, including the files users have stored to supplement their activity records. This makes it easy for you and others on campus to answer key questions like:

- Who has published recently in a given area?
- Who is best suited to pursue a given grant opportunity or to speak to an industry group or external constituent?
- What types of relationships do our faculty members have with a given organization through their service activities?

You can accomplish this by leveraging the **Specify text for which to search** parameter in **Run Ad Hoc Reports** to find the records that contain specific terms.

We determine the data a user can search using the scope and limitations of the security role that gives the user access to **Run Ad Hoc Reports**. If the user only has the ability to run *ad hoc* reports for particular users, he or she will only be able to search the information for those same users. If the user's **Run Ad Hoc Reports** permission does not include **Show Hidden Data**, the user will only be able to search fields that are *not* hidden for his or her scope of users.

Applying Criteria to Your Search

To search, type free-form text into the search box. Alternatively, you can use Boolean logic to be even more specific to obtain the exact information that you need. Details on this logic are readily available to users working with **Run Ad Hoc Reports** through the **More Information** link associated with this step.

Users can also combine their search with criteria selected through the other **Run Ad Hoc Reports** parameters – like a specific date range, specific screens, and specific users – to hone their searches. For example, a user could specify a date range of 2006 and 2009. To search only data from the Intellectual Contributions screen, he or she can limit the search by selecting this screen in **Select data to include.** He or she could then limit the search to the records for users in the Chemistry department through **Select who to include**. Applying such criteria to your search would limit the output to only Intellectual Contribution records between 2006 and 2009 for users in Chemistry that contain the text "amino acids".

Search Results

When you specify search terms, we return all records that contain the terms that you specify. It is important to note that search terms apply at a record-level, not a field-level. This means that if you search for "amino acids", Activity Insight will return all records that contain those words – even if the terms are not found in the specific fields that are included in the output of your report per your selections in **Select data to include**. For example, if you select to show only publication titles and authors, but the text is in the field that contains the abstract, we will still return that record.

The **File Format** and **Orientation and Paper Size** parameters of **Run Ad Hoc Reports** will be used to present the report containing your search results.

Overview of Report Customization

You and your colleagues will likely identify a number of reporting needs that Activity Insight will fill. It is useful to start integrating reports into your system right away since these reports will inform which data elements you will need to collect and how you will capture them.

To start out, select a few key reports that will meet the reporting needs of a variety of stakeholders. Building these into your system in preparation for the initial launch will ensure that everyone benefits from Activity Insight right away. This also helps to stimulate a holistic approach to implementation that involves customizing your system to collect data for multiple purposes.

Common reports that we see built in to Activity Insight are:

- Faculty Annual Report
- Faculty Credentialing Reports
- Promotion and Tenure Report
- Standardized Vita
- Unit Summary Report – supplement for Department or College Annual Report
- Conflict of Interest Report
- Outreach and Public Engagement Reports
- International Activity Reports
- Regional Accreditation Reports
- Professional Accreditation Reports
- NIH and NSF Biosketch Reports
- Data review or quality assurance reports

If your campus has formats or templates for these reports defined, we recommend reviewing those with your Solution Specialist to determine the best way to incorporate them into your Activity Insight implementation. If your campus does not have formats or templates defined, reviewing your goals in defining what the report output should include with your Solution Specialist is a good first step. Any examples that are in line with what you would like to build will be helpful to this conversation.

> **Note:** Currently, Digital Measures supports Arial, Times New Roman, and Courier as fonts for custom reports.

Types of Pre-Built Custom Reports

Sample Reports

On the **Run Custom Reports** page you will find sample reports that come with Activity Insight, as well as custom reports that you have had built.

The following sample reports are available immediately:

- 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

These reports are intended to be examples of the types of reports that can be built from Activity Insight, and while they pull data from the system in a useful way, you will likely want to augment or replace these reports with ones that more closely fit your campus's needs. If you would like us to build an entirely new report, just submit a Report Setup work request with a mock-up and instructions. For more information on Report Setup work requests, see "Submitting Report Setup Work Requests" in *Chapter 8: Managing Work Requests*.

Base Reports

In addition to the sample reports, Digital Measures can put in place a handful of pre-constructed reports for common audiences. The following are currently available:

- AACSB Accreditation
- ABET Accreditation
- NCATE/CAEP Accreditation
- SACS Accreditation
- National Institutes of Health (NIH) Biographical Sketch
- National Science Foundation (NSF) Biographical Sketch

To request that we put a set of base reports in place, submit a Report Setup work request inquiring about the availability of the report you need.

Of course, you can request that we build new custom reports to meet accreditation and other reporting needs at any time. This chapter will guide you through creating custom reports in Activity Insight.

Building New Custom Reports

Once your campus becomes familiar with Activity Insight and its reports, you will likely determine brand new reports you would like built specifically for your campus. You should submit each new report as a separate Report Setup work request. The best way to tell us exactly what you need for a new report is to provide a sample report mock-up in Microsoft Word or Excel for all reports that do not currently exist but that you want included in Activity Insight.

Creating a Report Mock-Up

You will need to create a mock-up report in Microsoft Word, Microsoft Excel or Rich Text Format for all reports that do not currently exist but that you want included in Activity Insight. This provides Digital Measures with a reference for the logic and layout you need in your report. Modifying an existing report template that is already available in Activity Insight to create your mock-up will simplify this process.

> **Note:** You can also use mock-up reports to indicate changes you would like made to existing reports. In these cases, use the report's template, marking the changes you would like made using Track Changes in Microsoft Word.

Report Templates

You can view the structure of each existing report in Activity Insight using its report template. This is accessible on the **Run Custom Reports** page. Simply choose the report you wish to examine, select the **Select Report** button to refresh the page, and then select **Details of how this report is built**. If prompted, open or save the file. We use the field label from the screen to denote data fields in the report template. In some cases, we enclose data elements in square brackets for easy reading when multiple fields appear close together. You can review the corresponding screen for a given section of the report, and any criteria for record selection in the grey description boxes.

The Contracts, Grants and Sponsored Research report template.

Requesting New Reports

Submit a separate Report Setup work request to Digital Measures for each report you need built. The following additional information should accompany each Report Setup request:

- **Who will run this report?**
  This is typically one or more security roles for one or more units – for example, the College Limited Administrator security role for the College of Education, or Faculty security role for the entire campus. In Activity Insight, we assign reports to security roles rather than specific users.

> **Note:** If your current set of available security roles does not contain one that meets the needs you have for a report, explain those needs as part of the Report Setup work request and Digital Measures will make a recommendations on how to meet them.
>
> To see current security role assignments for each report, use the **Download Custom Report Restrictions Report,** which is available under the **View Security Roles** menu from **Users and Security**.

- **What should we name the report?**
  Indicate the name by which you would like the report to appear on your **Run Custom Reports** drop-down list. For example, should we label your annual report Faculty Activity Report, Annual Activity Report, or Faculty Annual Activity Report? Capitalization and punctuation are important.

- **For what timeframe will you typically run the report?**
  For many reports, the timeframe for which you will run the report will influence the way that we setup the report to select records. For example, if you typically run your Annual Reports from July 1 - June 30, we will likely need to

setup the report to pull in only one set of summer term courses. Knowing up-front what your date range will be ensures that we can ask the right questions when putting the report in place.

- **For what group of users will you typically run the report?**
  Knowing whether you will typically run a report on a single individual, a specific unit, or the entire campus will ensure that we are scaling this report appropriately and grouping data at the correct level.

- **Attach an Example Report and a Report Mock-Up**
  Attaching both a sample of what a finished report should look like, along with the report's criteria in a mock-up will ensure that we understand both the formatting and logic that we should use when we build your report. That is, how we should select records for each section of the report, any grouping or sorting information for those sections, and any other logic that we should use when building the report. These attachments should be in Microsoft Word, Microsoft Excel or Rich Text Format.

For detailed instructions for Report Setup work requests, see "Submitting Report Setup Work Requests" in *Chapter 8: Managing Work Requests*.

New Report Affects on Screens and Records

Although you can add new reports at any time, adding new reports may require new data fields for activity entries. Users will then need to backfill affected records for all years to ensure they are included in the report. This process will require your users to revisit their completed work. Managing report construction alongside screen design is more of an art than a science, and will be iterative. Since new reports will likely require the addition of new fields to support the reports, it is important to try to reduce the amount of flux over time as much as possible. To ensure that screens are set up to collect as much of the necessary data as possible from the outset, we strongly recommend that you analyze as many of your reporting requirements toward the beginning of your implementation as possible, and factor in time for record updates or backfilling whenever you build a new report.

Running Custom Reports

Run Custom Reports is a template-based reporting utility that eliminates the drudgery of creating reports by digitizing the process. Digital Measures uses the specific data elements, calculations, and formatting you specify to construct standardized reports which your administrators and faculty can then run on the activity data in your instrument.

▶ **To run a custom report:**

1   In Activity Insight, select **Run Custom Reports** in the Left-Hand Menu, and select the report you wish to run from the drop-down list in **Step 1**.

> **Warning:** You must select the **Select Report** button after selecting the report from the drop-down list to refresh the page.

    a   To download a report template that shows how the report you selected is built, select **Details of how this report is built**.

Sample Creative Works report template.

2   Select the date range for the information you wish to include in your report.

Activity Insight will warn you if you attempt to create a report with an end date before the report's start date.

> **Note:** All reports, by default, will include records that overlap with the report date range selected at run time as well as any records that are undated. If a custom report should not include undated records, this should be specified when the report is created or as part of a Report Revision work request. In general, ensuring that faculty enter all applicable dates on their activity records will give you the best reporting accuracy.

3   Activity Insight's 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 as "and" options and the report will include all selections made.

Activity Insight uses the user attributes – college, department, etc. – in users' most recent **Yearly Data** records, including records in the future, to determine who should be included.

Select whom to include by clicking a heading below.

College

Department

Individual

SAVE   CANCEL

Pop-up window to select particular users accounts to include in a report.

> **Note:** If it would be helpful to select users to include in your reports based on an additional user attribute like faculty/staff rank, we can add this. Once added, this will be available as an additional **Select who to include** option in both **Run Ad Hoc Reports** and **Run Custom Reports**. To request this, submit a General work request.

> **Warning:** Changing the data in a report does not change the data inside Activity Insight. Use **Manage Your Activities** or **Manage Data** to make these changes.

    a   Select the headings to show or hide the groups and then select the ones 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.

When you have completed your selections, select **Save** at the bottom of the page to save your selections and return to the **Create a Report** page.

4   The **Create a Report** page will show the individuals you selected to include in your report under **Step 3**.

You can also select to include enabled, disabled, or both enabled and disabled users in your report as part of this step.

5   Select the file format for your report from the drop-down list in **Step 4**.

6   The default options are Microsoft Word, Adobe PDF, and HTML. Digital Measures can make some reports available in Microsoft Excel. You should specifically state this in the Report Setup or Report Revision(s) work request if you need this additional format option.

7   Select the paper size from the drop-down list in **Step 5**.

Activity Insight supports US Letter and A4 sizes.

8   Review your selections and select **Build Report**.

9   Activity Insight will build your report and you prompt you to either open it or save it locally.

> **Warning:** Changing the data in a report does not change the data inside Activity Insight. Use **Manage Your Activities** or **Manage Data** to make these changes.