FACULTY ACTIVITY DATABASE: REPORTS

Customizing Reports

- Overview of Report Customization
- Building New Custom Reports
- Submitting Reports

Overview of Report Customization

You and your colleagues will likely identify a number of reporting needs that The Faculty Activity Database will fill. It is useful to start integrating reports into your system right away since these reports will, to a large extent, inform which data elements you will need to collect and how they should be captured.

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 The Faculty Activity Database right away. This also helps to stimulate a holistic approach to implementation that involves customizing your system to collect data for multiple purposes.

Base Reports

You will find some custom reports preconfigured for you in The Faculty Activity Database. These include some administrative and screen-specific reports as well as a vita. These reports are intended to be examples of the types that can be built from The Faculty Activity Database, 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.

In addition to these reports, Digital Measures can put in place a handful of pre- constructed reports for common audiences. Base reports geared toward AACSB, ABET, NCATE and SACS accreditation and biographical sketch base reports for the National Institutes of Health (NIH) and National Science Foundation (NSF) are currently available. To request that a set of base reports be put in place, submit a Report Setup work request inquiring about the availability of the report you need.

Of course you can request that new custom reports be built to meet accreditation and other reporting needs at any time. This chapter will guide you through creating custom reports in The Faculty Activity Database.

Building New Custom Reports

Once your campus becomes familiar with The Faculty Activity Database and its reports, you will likely come up with new reports you would like built. To build new reports into The Faculty Activity Database, you will need to create a Report Setup work request and include a sample of the report in Microsoft Word or Excel or Rich Text Format showing how you would like it built.

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 every affected entry for all years to be included in the report, a process that will require your users to revisit their completed work. Collecting a complete set of reports up front enables Digital Measures to ensure that your instance of The Faculty Activity Database reflects the requirements of the reports your campus needs to create.

Each new report should be submitted as a separate Report Setup work request Create a sample mock-up report in Microsoft Word or Excel for all reports that do not currently exist but that you want included in The Faculty Activity Database. See "Submitting Report Setup Work Requests" in *Chapter 9: Managing Work Requests* for more information.

Creating a Sample Mock-Up Report

You will need to create a sample mock-up report in Microsoft Word or Excel or Rich Text Format for all reports that do not currently exist but that you want included in The Faculty Activity Database. Using an existing report that is already in The Faculty Activity Database as a template will simplify this process. Mock-up reports can also be used to indicate changes you would like made to existing reports.

You can view the structure of each report template in The Faculty Activity Database 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 you are prompted, open or save the file. Each data field is enclosed in square brackets.

Contracts, Grants and Sponsored Research
Your Organization
Report Start Date - Report End Date

Department

[Last Name], [Preferred First Name] [Initial of: [Middle Name]] ([Faculty/Staff Rank])

Screen: Contracts, Grants and Sponsored Research
Records: All Records

Current Status
[list of [**Investigators**] as "[Last Name], [First Name] [Middle Name/Initial] ([Role])"], "[Contract/Grant/Research Title]," Sponsored by [Sponsoring Organization], [Awarding Organization Is], $[Amount]. ([Start Month of Funding Start Day of Funding, Start Year of Funding - End Month of Funding End Day of Funding, End Year of Funding]).

The Contracts, Grants and Sponsored Research report template.

Submitting Reports

Submit a separate Report Setup work request to Digital Measures for each report you need built. The reports you submit should be in Microsoft Word or Excel, or Rich Text Format. Each report should be accompanied by additional information.

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 The Faculty Activity Database, reports are assigned 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.

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

For detailed instructions for Report Setup work requests, discuss with the FAD Administrators.

Running Reports

- Overview of Reporting
- Running Ad Hoc Reports
- Running Custom Reports

Overview of Reporting

The Faculty Activity Database provides powerful reporting that is customizable to fit your campus's exact needs. The Faculty Activity Database 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 The Faculty Activity Database, your campus can easily and quickly run reports 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
- Custom reports created to meet your campus's needs

You can also leverage the **Run Ad Hoc Reports** utility to search and analyze the information your users have stored in The Faculty Activity Database to find answers to key campus questions.

The Faculty Activity Database provides two methods for generating reports: **Run Ad Hoc Reports** and **Run Custom Reports**.

Note: Both ad hoc and custom reports will only include data stored within The Faculty Activity Database. 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 The Faculty Activity Database creates a report customized to your requirements.

Ad hoc reports are often used as a starting point for detailed analysis of the raw data in The Faculty Activity Database. Whether this be for comparing a user's records against the criteria of a custom report to verify completeness or troubleshoot an issue, as a starting point for statistical analysis, or as a way to determine which faculty have areas of expertise that qualify them for particular opportunities, an ad hoc report can be flexible enough to meet a wide variety of needs.

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 it. Request information on this from a FAD administrator.

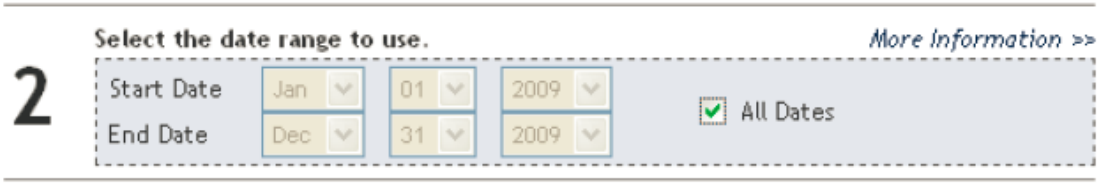
As you consider how you leverage **Run Ad Hoc Reports** on your campus, keep in mind that users will only have access to run reports on screens and fields to which they have access. To provide more flexibility the utility includes an option, **Show Hidden Data**, which enables you to choose whether you want to show or suppress hidden data in **Run Ad Hoc Reports** for a set of users. Ask a FAD Administrator for information on "Screen, Field and Data Settings" for more information on hidden fields. For more information on how the **Show Hidden Data** option is applied to this utility, ask a FAD Administrator about "Security Role Permissions".

Running an Ad Hoc Report

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

2 In step 1, select the instrument from which this report will be generated.

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.*

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

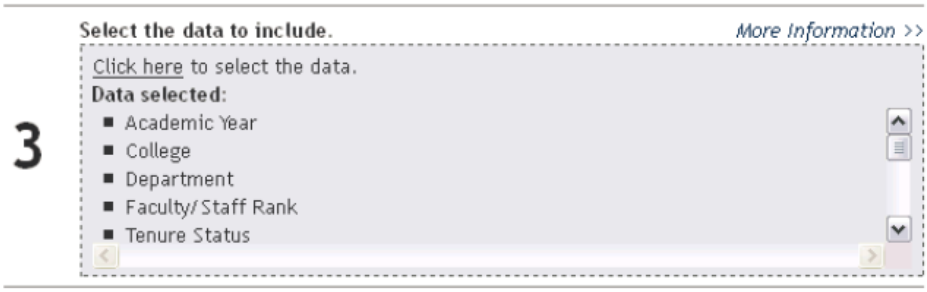
*The **Select data to include** pop-up window.*

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

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.

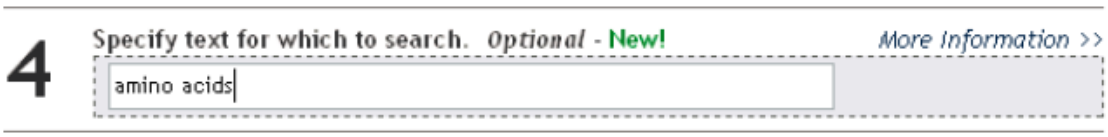
- Select **Save** at the bottom of the pop-up window to save your selections and return to the **Run Ad Hoc Reports** page.

5 The **Create New Report** page will display what data are now included in the report under step 3.



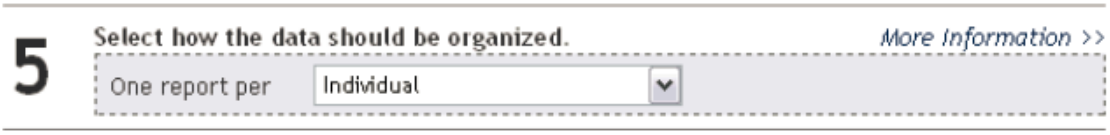
*The **Run Ad Hoc Reports** page showing the data selected for a report.*

6 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 The Faculty Activity Database, see "Searching Using **Run Ad Hoc Reports**" below.



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

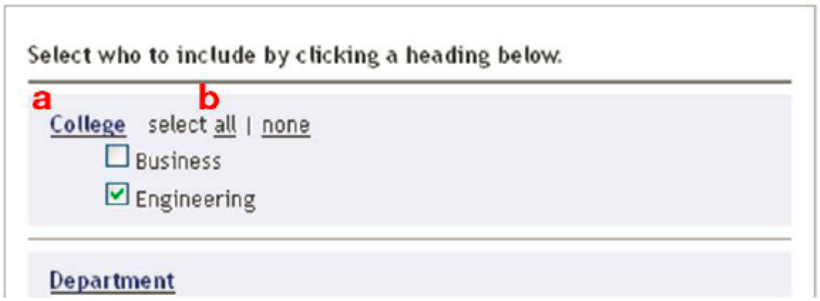
- Select an option for organizing the data in your report.
- The data in the report can be organized by unit, such as college or department, or by individual. For example, if you select department from the list, the report will be grouped for each department you have selected.



*The **Run Ad Hoc Reports** page showing the selection to organize the report by individual.*

- 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.
- 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.
- The Faculty Activity Database uses the user attributes - college, department, etc. - in users' most recent **Administrative Data - 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, this can be added. 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.

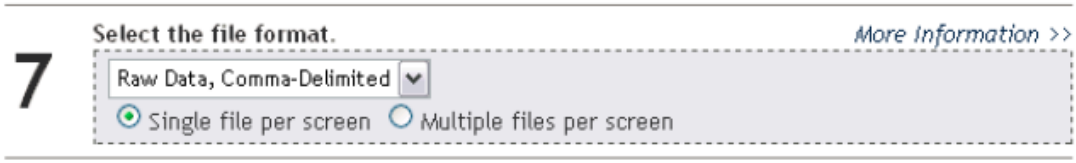


Selecting who to include in an ad hoc report.

- Select the headings to expand the groups and then select the ones you want to include in your report.
- 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.
- Furthermore, you can select to include enabled, disabled, or both enabled and disabled users in your report.
- 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 to include.*

- Select the file format for your report from the drop-down list in step 7.



*The **Run Ad Hoc Reports** page showing the Raw Data, Comma-Delimited file format, with a single file produced per screen.*

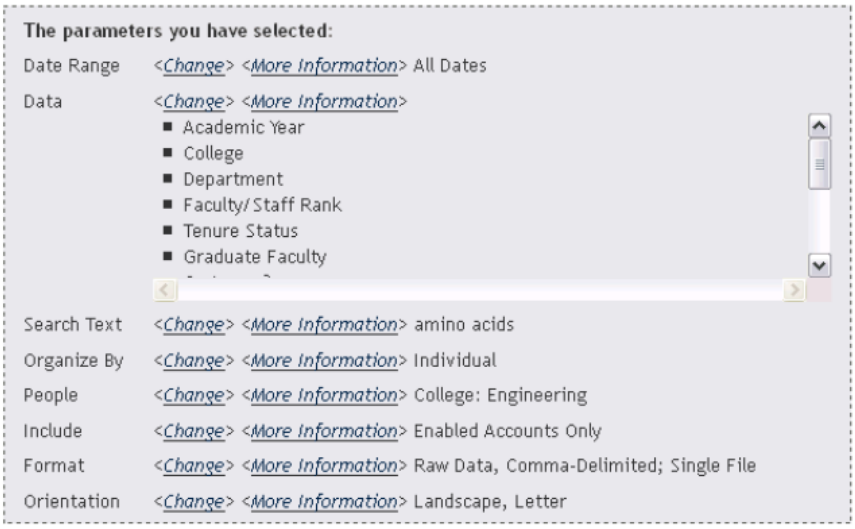
Note: Digital Measures supports several other file formats, including Adobe PDF; HTML; Raw Data, Comma-Delimited; and Raw Data, XML.

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,

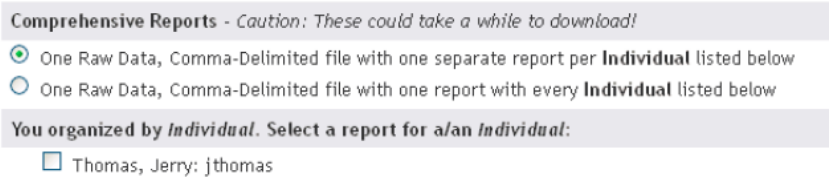
Comma-Delimited format are supported – a single file per screen, or multiple files per screen. For screens with Dynamic Sub-Answers (DSAs), like **Intellectual Contributions** with the **Authors** DSA, selecting to generate a single file per screen will result in the DSA data being included as additional 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.

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



Summary of the parameters selected for your ad hoc report.

- In the lower sections, choose the report options. The content of these options is based on your prior choices.



Sample report options.

- Review your selections and select **Build Report**.
- The Faculty Activity Database will build your report 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

Using Run Ad Hoc Reports

The Faculty Activity Database 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 quickly 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?

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

The data a user can search is determined by 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, just 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, all records that contain the terms that you specify will be returned. 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", all records that contain those words will be returned – 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 only show publication titles and authors, but the text is found in the field that contains the abstract, the record will still be returned.

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.

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.

On the **Run Custom Reports** page you will find sample reports that come with

The Faculty Activity Database, as well as custom reports that you have had built. The following 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

All of The Faculty Activity Database's report templates can be modified in any way to meet your campus's needs. Of course if you would like an entirely new report to be built, just submit a Report Setup work request with a mock-up and instructions. For more information on Report Setup work requests, ask a FAD Administrator about "Submitting Report Setup Work Requests".

Running a Custom Report

To run a custom report:

1 In The Faculty Activity Database, 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.

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

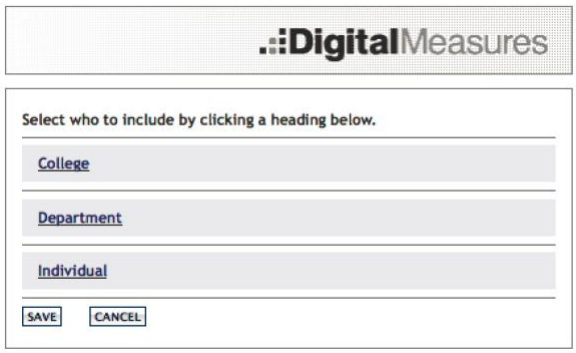
Sample Creative Works report template.

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

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

5 The Faculty Activity Database'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.

6 The Faculty Activity Database uses the user attributes - college, department, etc. - in users' most recent Administrative Data - Yearly Data records, including records in the future, to determine who should be included.



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, this can be added. 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.

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.

c) 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.

7 Further, you can select to include enabled, disabled, or both enabled and disabled users in your report.

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

9 Select the file format for your report from the drop-down list in step 4.

10 The default options are Microsoft Word, Adobe PDF, and HTML. Some reports can be made available in Microsoft Excel. This would need to be specifically stated in the Report Setup or Report Revision(s) work request.

11 Select the paper size from the drop-down list in step 5.

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

13 The Faculty Activity Database will build your report and you will be prompted to either open it or save it locally.