College Administrator Basics - Updated Sept. 30, 2015 – New Interface

1. Login, Users, and Security ......................................................... 2
2. Reviewing Usage Statistics & the Audit Report .............. 6
3. User Account Information ......................................................... 8
4. Running Reports ................................................................. 10

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Security

Adding a User

Log into the system:
https://www.digitalmeasures.com/login/boisestate/faculty/authentication/authenticateShibboleth.do

Click on “Users and Security” & then “ADD A NEW USER.”

When entering the name, be sure to enter the “Last Name” followed by the “First Name” and “Middle Name/Initial.” A common error when entering this information is to enter the first name into the “Last Name” field.

For Authentication, be sure to select “Shibboleth.”

For faculty, be sure to mark the check box, “Yes.”
Changing a Department for a User

Changing the department for a user after a user account has been created requires a few additional steps.

**Steps:**

1. Select the “Manage Data” button from the left hand menu bar. Use the drop down on the “Manage Data” screen and select the faculty member for whose department that you want to change.

   **Note:** Enabled accounts are accounts for users that are currently active in the system. All accounts include accounts for every user whether their account is enabled (currently active) or disabled (not active).

2. Be sure to select the correct College and Department to which the faculty member belongs.

3. Click on “Details” to view details of the security role.

4. Enter the name of the user that you just entered to double check your work and make changes if needed.

   Be sure to save the record at the bottom of the page.
Enabling a Disabled User

1. When a faculty member has left the university and then returns their account will need to be “Enabled.”

2. Click on “Semester Administrative Data” on the left hand menu bar.

3. Click on the record’s row to edit the record.

4. Select the correct department and then save your work.
Enter the last name of the user for whose record you wish to modify and click on “SEARCH.” When the correct user name appears click on the pencil.

Click on “ENABLE USER.” Note that the message in red tells you that the account is currently disabled.

A message appears that asks if you are sure you want to proceed. Click on “OK” and the account will become enabled or active again.

2. A “Semester Administrative Data” record is created for each semester a user is enabled (active) in the system. This is a process that is completed by our office. We need your assistance in keeping your faculty users list complete and accurate.

Click on the screen link, “Semester Administrative Data.”
**Disabling a User**

1. Click on “Users and Security” on the left hand menu bar.
2. Enter the last name of the user for whose record you wish to modify and click on “SEARCH.” When the correct user name appears click on the pencil.
3. Click on “Disable User”
4. A message appears and asks if you are sure you want to proceed. Click on “OK” and the account will become disabled or made inactive.

**NOTE:** We NEVER delete an account for any reason!

**Reviewing Usage Statistics & the Audit Report**

1. On the left hand menu click on, “Usage Statistics” this brings up your college numbers for logins and the number of records added and edited for a specific time period. During the faculty activity reporting, this data will help your college determine who may need assistance with completing their data entry for the evaluation period. You may also be able to download a copy of the data to MS Excel. To see specific details at the faculty level, click on the hyperlink for a College you would like to review.
Under the column, “Audit” on the report “Usage Statistics” click on the little box with the red circle.
This action will download an Excel document which will provide details of the selected user’s activities.

### Audit Report Headers

<table>
<thead>
<tr>
<th>Column Header Name</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>The user account for which this report was run.</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Date/Time the record was created or modified.</td>
<td></td>
</tr>
<tr>
<td>Screen</td>
<td>The screen where the record has been created or modified. A list of screen names is provided with the sample audit report.</td>
<td></td>
</tr>
<tr>
<td>Record ID</td>
<td>An internal number that Digital Measures uses.</td>
<td>Create-record was created, Update – record was updated or Delete-record was deleted from the system.</td>
</tr>
<tr>
<td>Event</td>
<td>The action that was recorded.</td>
<td>Import-indicates that the record was created or changed by a file being uploaded into the system. Manage-Data-indicates that another person besides the owner of the account created or changed the record.</td>
</tr>
<tr>
<td>Source</td>
<td>Indicates how the record was changed.</td>
<td></td>
</tr>
<tr>
<td>User</td>
<td>Shows the user that created or modified the record.</td>
<td></td>
</tr>
<tr>
<td>Data</td>
<td>What data was added or changed in the system.</td>
<td></td>
</tr>
</tbody>
</table>
User Account Information

Reviewing information in a faculty account

The Main Menu

The Main Menu that your college faculty views upon entering the system is divided into several sections. There are screens that all colleges use and others that have been customized to meet the specific needs of colleges.

Faculty Information

- Personal/Contact/Tenure Information
- Semester Administrative Data
- Academic, Government, Military, and Professional Positions
- Boise State Administrative Assignments

The first section of the Main Menu is called, “Faculty Information.” Faculty information contains information about the faculty member, their rank, positions, education, licenses and certifications and for some colleges it is also the section that contains workload information for some colleges.

Click on the “Personal/Contact/Tenure Information” hyperlink.

NOTE: Enabled accounts are accounts for users that are currently active in the system. All Accounts includes accounts for every user whether their account is enabled (currently active) or disabled (not active).
Notice at the top of the screen it displays who you are managing data for. Be sure to always check the top of the screen for this information prior to making any changes to the information. This will help keep you from adding or modifying information to the wrong user’s records.

On each screen there are buttons allowing users to save their work or return without making changes.

There are two sections which offer directions for entering data into the record. These sections are found on every screen.

Tenure

Some colleges have requested to upload their faculty tenure information into the Digital Measures system. Although, Digital Measures should not be considered the official source for human resource data we are happy to upload files into the system for any college who wishes to have their information tracked in Digital Measures. College administrators should send their files through the Boise State Digital Measures email. An email will be sent when the files are loaded and the administrator will run an ad hoc report to verify that the data has loaded correctly.

A red “R” on a screen indicates a field that is “read-only.” Only users with a specific level of security have access to these types of fields. They are applied to specific fields that are uploaded or should be completed by college administrator level users.

There is no auto-save feature within the system, so when entering data, be sure to save your work or your work will be lost.

Be sure to save your work.
Running Reports

There are two types of reports that you may choose to run:

1. **Pre-existing** reports that have been developed to meet specific reporting needs of the university, your college or departments within your college (Formerly called *Custom Reports*). Different reports run in different file formats. If you do not like the way the report appears in the format you selected, try a different format.

2. Reports **you build** on-the-fly to review data for your college in Excel csv, PDF, XML or Word format (formerly called *Ad Hoc Reports*). We suggest you use Word or PDF as the file format when running a report for faculty.

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Pre-existing reports

Reports have been created for both the university and your college. You will have access to all of the reports as the university administrator. These reports are designed to obtain specific data that is repeatedly used by the university and college.

Click on, “Run Reports,” in the left hand menu bar.

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College reports start with “COLL” followed by the abbreviation of the college and the name of the report.

University reports start with “UNIV” followed by the report name.

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1. Use the down arrow to select the report you wish you run.
2. The “Run Report” button will not be available until you have selected a report.
3. You may choose to click on “Details of how this report is built” to review the criteria for the report.
Select the start and end date for your report.

The default for selecting Whom to Include is all Enabled faculty accounts at Boise State. Click on the “Change selection...” hyperlink and, in the pop-up, be sure to select the correct department or faculty member that you want. You may also choose between Enabled Only, Disabled Only or Enabled and Disabled accounts to be included.

The remaining sections provide details on options for data to include/exclude and the format for the report.

*Note: The specific options under “Report Options” will vary by pre-existing report.*
**Ad Hoc Reports**

**Step 1:** On the left hand menu bar, find the link, "Run Reports." Click on the down arrow and select “Create a new report” at the bottom of the drop-down.

**Step 2**” In the “Instrument” drop-down, select “Activities Database – University.” The rest of the steps in the report-building process will now appear on the web page.
**Step 3:** Select the date range you wish to run the report for or click on the “All Dates” button.

**Step 4:** As with pre-existing reports, you must decide whom to include in your report. When you disable a user's account, the user can no longer login to the system. Even though you may disable a user's account, you may still want to report on the user’s information, and this feature allows you to do that. In this screen shot, only Enabled accounts are selected.

This feature allows you to run all data or data for particular screens. To select data from particular screens click on “Change selection” in the “Data to Include” row.

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**Step 5:** DIRECTIONS FOR SELECTING SPECIFIC SCREENS/FIELDS:

1. In the row, Data to Include, click on “Change selection.”

2. In the pop-up, uncheck “Include All”. This action will allow you to select specific screens /fields for your report.

3. Click the side arrow (>) next to “Common Items.” The screens list will appear.

4. Select a screen you wish to add to the criteria of your report by clicking on the check box for that screen. It will automatically expand to show the fields (data points) that will be included from that screen. Scroll down to choose other screens to include, if desired.

5. Be sure to scroll to the bottom of the screen and click on “SAVE” to ensure that the screens/fields have been saved to your report criteria.
### Step 6: Grouping Method

If you wish to break out your data by **groups** of people, be sure to choose an option from the *Grouping Method* row. The most common choice will either be “College” or “Department”. For example, if organization is requested by "Department," one report will be built for each department. As a second example, if organization is requested by "Name," one report will be built for each person.

### Step 7: Search Keywords

This option allows you to specify text you want to find within a specific record of information. Enter the text that you are looking for. Be sure to include quotation marks before and after a title of a publication or for any text that you want to keep together.

### Step 8: Select the file format for which you wish to run the report in:

**Raw Data, Comma-Delimited** (default) – Reports in this format are easy to filter in Excel although there are columns with key fields that may be confusing to the user. There are two additional options for this selection:
- **Single file per screen**: Provides one CSV file with columns for each of the Intellectual Contributions fields selected. In cases where a publication has more than one author, columns are added to the file to display the additional information.
- **Multiple files per screen**: Provides one file with the record-level Intellectual Contributions fields, and one file with the Author fields. This displays one row per author in the second file, rather than one row per publication.

**Microsoft Word** - Reports in Microsoft Word format are able to be opened by any version of Microsoft Word (97, 2000, XP, 2003, etc.).

**Adobe PDF** - These reports are in Adobe PDF (.pdf) file format. Adobe PDF files are able to be opened by nearly any computer, regardless of operating system.

**HTML (Webpage)** - Reports in HTML format are able to be posted to a website very easily. HTML files are standard webpages that are readable by web browsers.
Step 9: Review the parameters of what you have selected for your report.

Click on “Run Report” at the top of the web page to continue. A file should then download to your computer.

Once you have clicked on “Run Report”, a pop-up will appear indicating the report is running.
Running a Rapid Report/Using Pasteboard

When you have selected data for which there is no data an error message will appear on the screen to advise you of this error. You do not need to contact Digital Measures. However, if you receive this message when you have selected criteria for which there should be data, contact our office at: digitalmeasures@boisestate.edu.

On the upper left hand side of the faculty member’s main menu screen there two links under the “Manage Data” heading.

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.

Pasteboard allows to Copy-and-paste content from other sources into the “Paste board”, then drag-and-drop or copy-and-paste text into the fields above.
Rapid Reports (pop-up):
1. Click on the down arrow to select your report (the choices vary by College to which the user has been assigned).
2. Pick the dates for which you choose to run the report.
3. Select the “File Format” for which you wish to run your report.
4. Finally, click on “Run Report”.

Pasteboard:
1. A pop-up should appear in yellow somewhere on the screen—this does not prevent you from accessing fields on the user’s page.
2. Copy and paste text from another source such as a Word document.
3. Place the text in the “Pasteboard” feature.
4. Use the text to populate the field where you wish the data in the field you wish you populate.
   A. Highlight the text and using the right portion of your mouse push down.
   B. Move the text to the appropriate field.
5. When you are finished, you may close the PasteBoard by clicking on the X in the upper-right corner of the PasteBoard.