Baylor University

Digital Measures – Activity Insight User Guide

Hankamer School of Business

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Office of Institutional Research & Testing
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Background Information

Digital Measures – Activity Insight is software used to manage data relating to faculty teaching, research, and service which in turn can be used to support a number of institutional needs including annual faculty reviews, accreditation, etc. The company was founded in 1999 growing out of an implementation of online course evaluations at the University of Wisconsin. It is Oracle based and the data is stored on their servers and backed up nightly at five different geographical locations in conjunction with Sun Microsystems and Iron Mountain. To see an overview video, follow this link - http://www.digitalmeasures.com/ActivityInsight

The Hankamer School of Business has been successfully utilizing Digital Measures since 2007 in order to conduct faculty annual reviews, AACSB accreditation reporting, as well as feeding an online directory and web-based faculty profiles.

In August 2014, Dr. Michael Matier (Vice Provost of Institutional Effectiveness), launched a pilot program to implement Digital Measures campus wide. The School of Engineering and Computer Science was selected as the pilot implementation with the goal to produce a common ECS Faculty Annual Review Report.

In October 2015, the University officially adopted Digital Measures – Activity Insight for campus-wide implementation. Beginning in January 2016, a 4-year phase-in plan was implemented under the direction of Dr. Michael Matier.

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How to Login

To access Digital Measures go to http://www.baylor.edu/DigitalMeasures or scroll to the footer of any HSB web page. Under ‘Resources and Tools’, click ‘Digital Measures’.

Your login and password is the same as your Baylor (BearID) login.

If you are within the Baylor network, it is seamless and you do not realize that you have logged in – this is known as portal authentication. The university is moving to using Shibboleth authentication, though.

If prompted for a username and password use the following:
Username = Baylor\<BearID>
Password = <BearID password>

Please note: If you log off of Digital Measures and try to log in on a different computer, there is a 30-min grace period until Digital Measures will allow you to log back in.

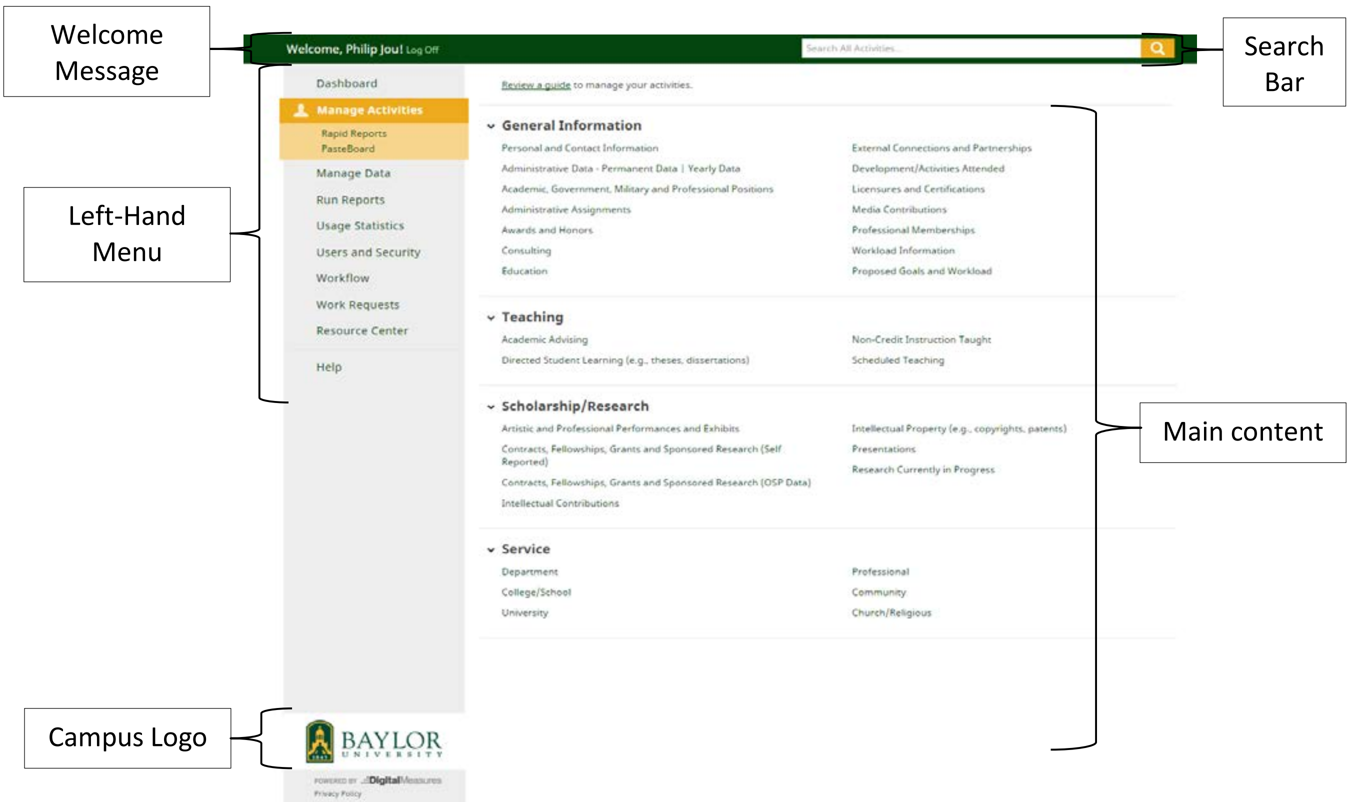
If you are using a laptop on AirBear, you will need to VPN and then connect to Digital Measures. AirBear does not give a true IP address and Digital Measures cannot verify the user. If you are using a laptop in a docking station inside the Baylor network, be sure that wireless is turned off.

Digital Measures – Activity Insight

Overview of Navigating the Website

Digital Measures – Activity Insight consists of 5 major components (depicted below)

- Campus Logo (top left)
- Welcome Message
- Left-Hand Menu (will always appear no matter what screen you are on)
- Main content for each activity
- Search bar



The Left-Hand Menu and Main Content are the primary method for navigating around. For most users, the utilities that are most commonly used are 'Manage Your Activities' and 'Run Reports'.

- Manage Your Activities: used to explore and input data. This utility allows users to track their teaching, research, and service activities. The instructional text on the top of the 'Manage Your Activities' page will always contain a link to a universal Faculty Guide that is maintained by Digital Measures.
- Run Reports: used to generate a report based on fields selected by the user or used to generate reports that have been specially designed for a purpose .

For faculty that have an Administrative Role within the unit, the 'Manage Data' utility will be available in the left-hand menu. Administrative Roles include Dean, Associate Dean, Department Chair, Assistant Department Chair, etc. 'Manage Data' enables the user to edit the activities of another user.

Exploring and Inputting Data (Manage Your Activities)

As you explore each section and screen keep the items below in mind:

- On many of the drop-down menus, the option of 'Other' is available. If 'Other' is selected, be sure to fill in the 'Explanation of "Other"' field. The database will be monitored and if an item in 'Explanation of "Other"' appears often enough, it will be added to the drop-down menu. The Digital Measures Administrator will adjust the effected records.
- Once a screen is selected, certain options will be available depending on the security that has been applied to that screen.

Below are options that could be available to you:

Add a new record	Click 'Add New Item'	+ Add New Item
Copy/Duplicate a record	Click the 'Duplicate'	Duplicate
Delete a record	Click the check box next to one or more records Click the trash can icon	
Search for a record	Input search criteria in the text field at the top of the screen and click the magnifying glass	Search All Activities...

- If a screen has been locked down (meaning changes can only be applied by the Digital Measures Administrator) the only option you will have is to view records. Typically this occurs when data has been pre-loaded into DM from university systems of record (Banner).
- The default behavior of the search bar is to search all activities. The search bar will automatically adjust to only search records within the activity selected.

- Once a record is selected, various items appear on the screen. Depending on the level of security applied to the user account and what fields are available, different items may or may not be visible.

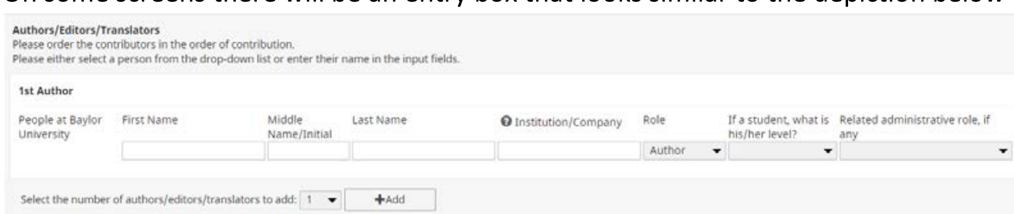
Below are options and indicators that could be available to you:

Read-Only Field	Indicated by a red 'R'	R
Hidden Field	Indicated by a red 'H'	H
Locked Field	Indicated by a pad lock icon	
Resizing a Text Box	Available if open text fields exists on the screen. Click and drag the lower-right corner of the text field	
Help Icon	Click the '?' icon for additional information relating to the field	?
Save	Click the 'Save' button to save the current record and return to the previous screen	Save | Save + Add Another

Save and Add Another	Click the 'Save + Add Another' button to save the current record and add a new record	
Cancel	Click the 'Cancel' button to return to the previous screen without saving any changes made	Cancel
Return to Previous Screen	Click '<' icon to return to the previous screen	<

- The PasteBoard (A time-saving feature)
    - The PasteBoard is designed to be a time-saving feature. The PasteBoard allows a user to copy text from another document, such as a CV in Microsoft Word, and paste it into the PasteBoard. Once the pasted text is in the PasteBoard, a user can then select text from it, click-and-hold on the text selected, and drag the text into a field in the system to have it pasted into the field.
    - To access the PasteBoard, click the word 'PasteBoard' in the left-hand menu under 'Manage Activities'.
    - When copying data from a Word document, please paste it to the PasteBoard and then copy it from the PasteBoard into Digital Measures. This will strip out any special characters.

- If a Start Date field is present, at minimum a year must be inputted
- If a Start Date is present with no End Date, Digital Measures considers this an open-ended item. That record will appear on any report that uses the screen until an End Date is inputted.
- Dynamic Sub-Answer (DSA)
    - On some screens there will be an entry box that looks similar to the depiction below



    - These entries are meant to track an activity if multiple individuals are involved (e.g., A book published by multiple authors, a grant containing multiple faculty members, etc.)
    - The primary "owner" of the activity should be the one that enters the information initially. Digital Measures will automatically link other users to the record.
    - In order to add additional records, set the number of additional records to add and click '+Add'
    - In the new fields, the system will allow for searching of existing users.
        - 'Select or type a name….' will appear in the left-most box of the new field.
            - Click in the box to either select a name or begin typing to search for a name and select it
        - Unless a user used a different pen name or is not in the system the name fields can be left alone.
            - If the missing individual is a Baylor employee, contact the Digital Measures Administrator
- UNLESS OTHERWISE INDICATED, NOT ALL FIELDS ARE REQUIRED TO BE INPUTTED

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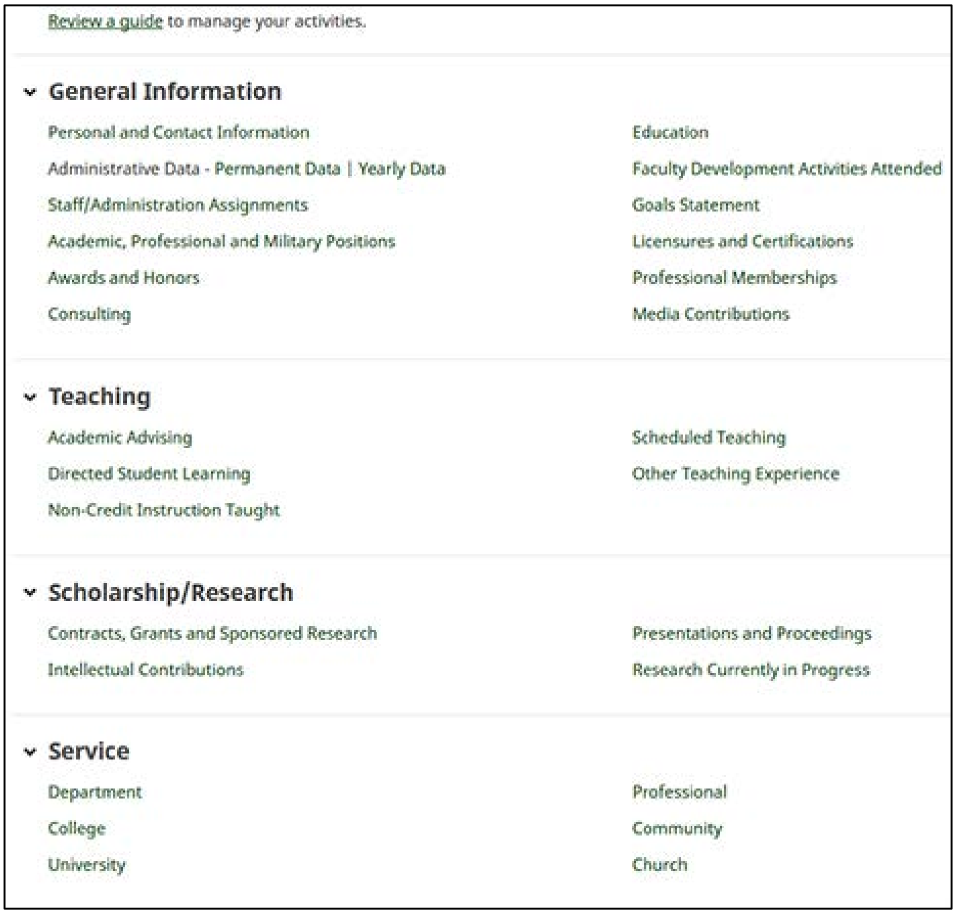
Manage Your Activities Main Menu

There are 4 major sections to Manage Your Activities consisting of various screens underneath each section (depicted below)

- General Information
- Teaching
- Scholarship/Research
- Service



'Manage Your Activities' Main Menu

General Information Section & Screens

Personal and Contact Information

- Contains information relating to a user’s name, e-mail, office location, phone numbers, etc.
- The bulk of the information in this screen is pre-loaded for the user and cannot be altered by the user. Pre-loaded information was attained through the University’s Banner data system.
- If there is an error with the data, please contact the Digital Measures Administrator.

Administrative Data – Permanent Data

- Contains information regarding the progression of ranks that a user attained
- The data for this screen has been pre-loaded for each user.
- If there is an error, please contact the Department Chair or the Digital Measures Administrator to alter the data.

Administrative Data – Yearly Data

- Contains information regarding a user’s current rank, tenure status, Sabbatical Status, and Full-Time Equivalency
- The data for this screen is pre-loaded and is not editable by the user. This data will be loaded by the Digital Measures Administrator.
- If there is an error, please contact the Digital Measures Administrator

Staff/Administrative Assignments

- Is only filled out by a faculty member that holds an Administrative Role in the Academic unit.

Academic, Government, Military and Professional Positions

- Used to track any of the above-mentioned positions that a faculty member has held or is currently holding

Awards and Honors

- Used for inputting any Awards and Honors, both internal and external, attained by the faculty

Consulting

- Used to track any external consulting done by the faculty

Education

- Contains the educational background of the faculty
- This data is pre-loaded. If there are errors, please contact the Digital Measures Administrator.

Faculty Development Activities Attended

- Used to track activities such as Conference Attendance, Continuing Education Programs, Seminar’s, Workshop’s, etc. In essence, anything a faculty member has done to enhance their development as an employee of the University.

Goals Statement
- Goals for the Academic Year.

Licensures and Certifications
- Used to track any Licenses and Certifications held by the faculty

Professional Memberships
- Can also track if a Leadership position was held by the faculty member in the professional organization
- Used to track Professional Organizations of which a faculty is a member

Media Contributions
- Used to track any TV, Radio, Newspaper, Magazine, Internet, etc. activities by the faculty

Teaching Section & Screens

Academic Advising
- Used to track summarized advising activity by Academic Year.
- Advisement is no longer conducted by the Unit and is tracked by the University using a separate system. The future of this screen is to be determined. At this time no data should be entered into this screen.

Directed Student Learning
- Used to track activity related to a faculty member aiding in any capacity on a thesis, dissertation, research, etc.
- This would include being the direct advisor, serving on a dissertation/thesis committee, supervising the research, etc.

Non-Credit Instruction Taught
- Used to track activity related to a faculty teaching outside the purview of their general teaching responsibilities
- Includes Certification Training Course, Continuing Education, Guest Lecturing, Review Courses, Seminars, Workshops, etc.

Scheduled Teaching
- Primary screen to track a faculty members teaching schedule at the University
- A faculty member does not have the capability to add/create their own records to this section
- A bulk of the information in this screen is pre-loaded for the faculty and cannot be altered by the user. Pre-loaded information was attained through the University's Banner data system.

Other Teaching Experience

Scholarship/Research Section & Screens

Contracts, Fellowships, Grants and Sponsored Research
- Used to track activities related to the above listed.

Intellectual Contributions

- Used to track any original scholarly works authored to advance the theory, practice, and/or teaching within the field (e.g., journal articles, conference proceedings, books, etc.).
- It is the responsibility of the faculty member to maintain an up-to-date listing.
- Records in Google Scholar or other systems may be exported into a BibTex file and then imported into Digital Measures.

Presentations

- Used to track differing types of presentations
- It is possible to have an entry under 'Presentations' as well as 'Intellectual Contributions'
    - For example, a published journal article will be placed under Intellectual Contributions. If the faculty member presented on that journal article, then that activity would be placed in Presentations.

Research Currently In Progress

- Similar to the Contracts, Fellowships, Grants and Sponsored Research screen but strictly for only those that are in progress

Service Section & Screens

All screens

- Every screen under the Service section is similar in nature. The various screens are to allow the faculty to better divide up service that was done in any capacity (voluntary, faculty, administrative, etc.).

How to create/build a report

Prior to Summer 2015, there were two separate menu options to create a report. After Summer 2015, Digital Measures consolidated report generation to one menu option.

Create a New Report (formerly Ad-Hoc Reports) – Not available to faculty/staff

1. From the dropdown, select 'Create a new report'.
2. Select the date range to run the reports.
   - If all records are desired, select 'All Dates' otherwise specify the start and end dates. The default is the current calendar year.
3. Select whom to include.
   - The options for this step will vary depending on the user's level of security
   - The default option for this step is 'All'
   - Select 'Change selection…' to select who to report the data on. A pop up window will appear
     - In this Window select which individual(s) to report on. This can be done by entire College(s)/School(s), entire Department(s), or by Individual(s)
     - Once selections have been made, click 'Save'. The window will automatically close
4. Select the data to include.
   - It is highly recommend to select data and not leave the default option of 'All Data'
   - Select 'Click selection…' to select the data to report on. A pop up window will appear
     - In this window select which screens and items within those screens to report on
     - Once selections have been made, click 'Save'. The window will automatically close
5. Select Grouping Method
   - The options for this step will vary depending on the user's level of security
6. Specify text to search for.
   - This is an optional step. By specifying text, only records that contain the specified text will be reported.
7. Select the file format
   - There are 5 options
     - Comma-Separated Values: output as *.csv file, default option
     - Microsoft Word: output as *.doc file
     - PDF: output as *.pdf file
     - Web Page: output as *.html file
     - XML: output as *.xml file. This is typically only used by administrators or to generate an output for a web administrator to use
   - Files per Screen
     - Single, default option
     - Multiple

- Once all selections have been made, click 'Run Report' in the upper right. The report will be generated and a prompt to save the file will appear once it is finished processing

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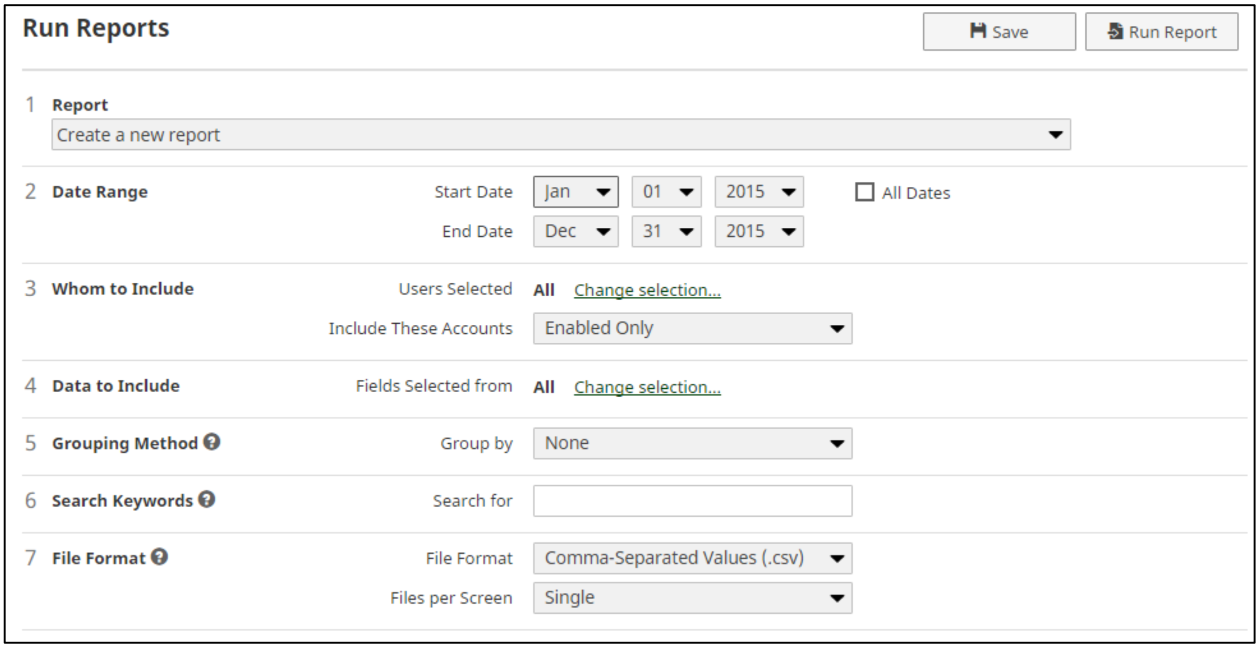
- Any user can save a report under ‘Create a New Report’ so that it can be run again at a later time.
  - Click the ‘Save’ button to save the current settings. The system will prompt the user for a Report Name. Input a name and click ‘Save’ again to save the report.
  - The saved report will only be available to the user that created the report. Users cannot share reports with another user at this time.



Create a New Report – 7 Step Selection Process

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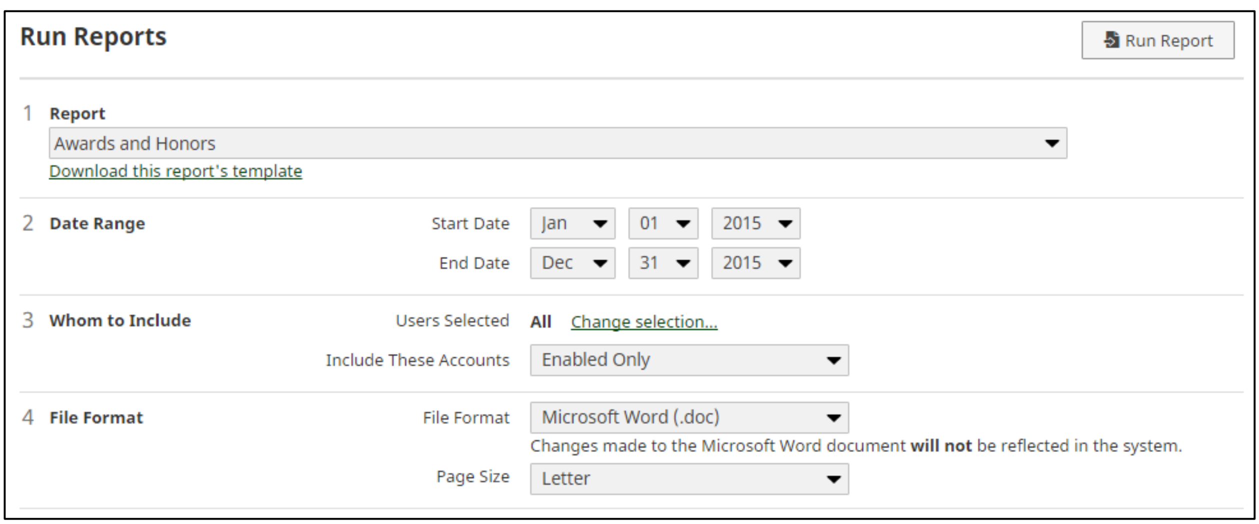
Create a Custom-Built Report

- Click 'Run Reports' in the Left-Hand Menu. Select any report from the drop down except for 'Create a New Report' and reports saved by a user.
    1. Select the report to run
        - Use the drop down to select the report to run
        - Depending on the level of security applied to the user, different reports will be available
        - To see how a particular report is built by Digital Measures click '*Download this report's template*'. This will generate a document that indicates which screens and fields are used to generate the report.
    2. Select the date range to use
        - The default is the current calendar year.
    3. Select whom to include
        - The options for this step will vary depending on the user's level of security
        - The default option for this step is 'All'
        - Select 'Change selection…' to select who to report the data on. A pop up window will appear
            - In this Window select which individual(s) to report on. This can be done by entire College(s)/School(s), entire Department(s), or by Individual(s)
            - Once selections have been made, click 'Save'. The window will automatically close
    4. Select the file format
        - There are 3 options
            - Microsoft Word: output as a *.doc file, this is the default option
            - Adobe PDF: output as a *.pdf file
            - HTML: output as a *.html file
        - Select the page size
            - There are 2 options: Letter (default) or A4
- Once all selections are made, click 'Run Report' in the upper right. The report will be generated and a prompt to save the file will appear once it is finished processing



Custom Report – 4 Step Selection Process

How to Manage Data of another User
Workflow

Workflow is used to centralize the collection of data and review. Users with access to workflow will be able to choose a process, submit files to the process and review their submissions. Once the user has submitted a file or files, and comments, the submission cannot be edited. Multiple submissions can be made, though.