Digital Measures

Instructions for Creating a New Report

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Creating a New Report

In this manual you will find:

- How to log in to Digital Measures.
- How to create a new report in Digital Measures.
# Table of Contents

- Introduction .................................................................................................................. 1
- Log in to Digital Measures ................................................................................................. 1
- Creating a New Report ....................................................................................................... 2
- Running Your Report ......................................................................................................... 5
- Saving Your Report ........................................................................................................... 5
- Deleting Your Report ......................................................................................................... 5
CREATING A NEW REPORT

Introduction

If your Digital Measures access allows you to Create a New Report in Digital Measures, you can build reports with specific data that you choose. This allows flexibility in accessing faculty data in Digital Measures. Faculty generally do not have access to this feature, but department administrators and department administrative staff normally do.

Log in to Digital Measures

- In the address field of your preferred browser, type: http://my.utsa.edu.
- Click on Digital Measures under Faculty/Staff Resources:

  ![Digital Measures](image)

  - You will be taken to the Digital Measures landing page. (You may wish to save this landing page to your Favorites or Bookmarks in your preferred browser.)
  - From the landing page, click on the orange UTSA Digital Measures button on the upper right side of the page to reach the Digital Measures log-in page.

Log in using your myUTSA ID (abc123) and passphrase.
Creating a New Report

From the main page in Digital Measures, click on the Run Reports link in the gray area on the left side of the screen. The following screen will open:

Click the down arrow on the right end of the gray box under Report. A drop-down list of existing reports available to you will display. At the bottom of the list is the option to “Create a new report.” Click this option.
A screen will open displaying a series of seven steps for creating a new report:

**Step 1: Report**
You have already selected “Create a New Report,” which will be displayed in the field under Report.

**Step 2: Date Range**
Select the “Start Date” and “End Date” that you wish for the report to encompass. If you wish to capture all instances of a particular data set (that you will select in a later step) regardless of the dates associated with the data, you can check the All Dates box.

**Step 3: Whom to Include**
By default, this step will display All next to “Users Selected.” This means all colleges, department, and/or faculty for whom you have ‘Manage Data’ rights will display in the report you build. If you wish to select a different set of faculty to include, click Change selection.... A white dialog box will open where you can make College, Department, or Individual selections for inclusion in your report. Click the caret symbol to the left of each section to display the options available to you.

Select an option from the drop-down list for “Include These Accounts”: ‘Enabled Only’, ‘Disabled Only’, or ‘Enabled and Disabled’. (Faculty who have left the university or are not actively teaching at the time of the report may have disabled accounts.)

**Step 4: Data to Include**
In this step, you will choose the data that you to include in your report. The available data corresponds to every field on every screen in Digital Measures; that is what the default setting for “Fields Select from” is: All. You will not want to create a report that encompasses every
available piece of data for each faculty member. Such a report would be unwieldy and too large to be readily usable. Click **Change selection...** to select the data that you wish to include in your report. A white dialog box will open.

Uncheck the topmost “Include All” box. If you wish to display the faculty members’ college/department on your report, click the caret next to “**Most Recent**” box and select **College** and/or **Department**.

Click on the caret next to the box for **Common Items**. Each category displayed represents a corresponding screen in Digital Measures. When you click the caret next to the box for a screen name, all of the fields from that screen will display. These fields correspond to the data entered on that screen in DM.

You can select the data that you want to include in your new report by checking the boxes next to the appropriate fields. Once you have selected the screen/field(s) you wish to include, scroll to the bottom of the box and click **[Save]**.

**IMPORTANT -- PLEASE NOTE:** DM cannot combine data from multiple DM screens on one report. It is best to select only one screen name (category under **Common Items**) per report; however, you may select multiple fields under that screen name.

If you choose to select data from multiple screen names and choose a file format of “Comma-Separated Values (.csv)”, DM will create a zip file with separate reports for each screen. If you are an experienced Excel and/or Access user, this will allow you more flexibility in combining and manipulating the data on a spreadsheet.

If you choose to select data from multiple screen names and choose a file format of “Microsoft Word (.doc)”, “PDF”, OR “Web Page (.html)”, the output file will consist of a separate report for each selected screen combined into one document.

**Step 5: Grouping Method**

This step allows you to select how you would like the data grouped. The default is “None,” which will probably work for most reports. Click on the symbol next to **Grouping Method** for more information on how this feature works.

**Step 6: Search Keywords**

This step allows you to use keywords to narrow down your data, if you wish to select data that pertains to a specific subject matter. Click on the symbol next to **Search Keywords** for more information on how this feature works.

**Step 7: File Format.**

The default format setting for created reports is “Comma-Separated Values (.csv)” which will open as an Excel file and allow you greater flexibility in manipulating data. You may also choose...
one of the other file format options by clicking the down arrow at the end of the gray box, if you prefer.

When you have completed all seven steps above, you have two options. You can run the report (print/download/save to your computer) or you can save the report so that it will be available to you for future use.

**Running Your Report**
To run the created report (without saving it), click on **[Run Report]** on the top right side of the screen. The report will open in the format you selected. You can review, print, download, or save the output file to your computer. Remember that any changes made to the output file will not be preserved in Digital Measures.

**Saving Your Report**
If you would like to save the report you have created for future use, click **[Save]** on the top right side of the screen. A white dialog box will open with a field where you can type the name you wish to give the report. After entering the name, click **[Save]** and the report will be added to the list of reports available to you when you run reports. It will be available only to you and will not be visible to other users. After saving the report, you may also choose to run the report, following the steps above. Remember that any changes made to the output file will not be preserved in Digital Measures.

**Deleting Your Report**
If at any time after creating/saving the report you wish to delete it, select the report from the drop-down list under **Run Reports**, then click on the trashcan icon on the top right portion of the screen. You will be asked if you are sure you want to delete the report; to delete it, click the **[Delete]** button.