DIGITAL MEASURES

FACULTY & STAFF GUIDE

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Contents

DIGITAL MEASURES OVERVIEW

Digital Measures organizes data and builds reports on teaching, research and service activities. It enables faculty to record their activity information just once and use it many times for reports such as annual activity reports, promotion and tenure documents, accreditation reports, CVs, profile on Mays website and more. It also assists department heads and the Dean's office in responding to requests for faculty-related data, rather than needing to continually ask faculty for the information. This enables administrators to communicate more effectively about faculty accomplishments.

Digital Measures is designed to be easy to navigate. To help you get started, here is a quick overview of the utilities you will work with most often.

LEFT-HAND MENU
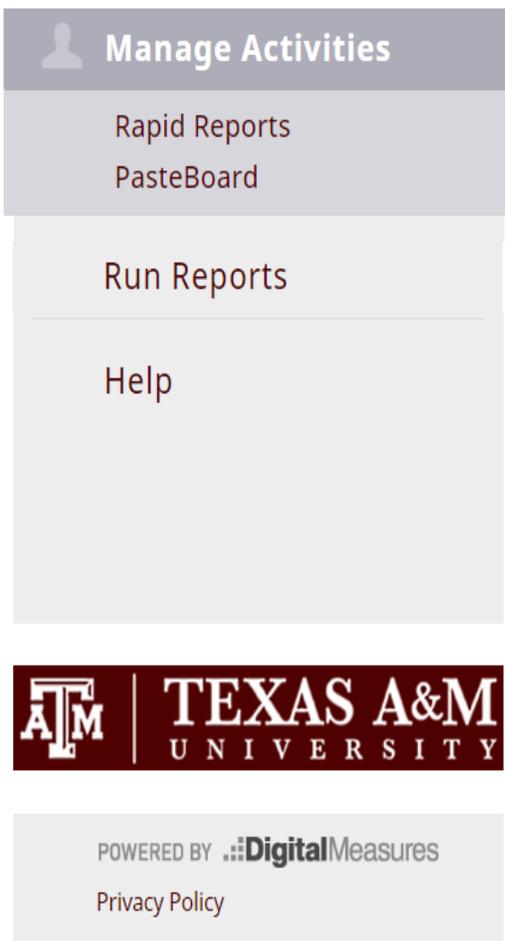
The left-hand menu displays at least two main utilities, **Manage Activities** and **Run Reports**. You might have other utilities if your Digital Measures Administrator has given you security access to them.

- **Manage Activities:** Add or update information about the activities you accomplish. Each faculty member can only update their own records. However, your department has appointed a DM resource expert who will be able to modify your record *with your permission.*
- **Run Reports:** Run reports that have been custom-built for Mays Business School.
- **Help:** Submit suggestions on how to improve the system, questions about use of the system, or report system errors with the Help link.

MANAGE ACTIVITIES

Overview of Manage Activities

When you first visit this page, it would be good to spend a few minutes looking through the screens accessible from it. To access a screen, click its name. The resulting *summary screen* displays records that are stored for that screen. For example, if you click on publications, you will see a high level summary of your publications, or you *will* once you upload the data (more on that below). There are a number of possible actions you can take from each screen, although not all of these actions will always be available:

- To add a new record, select the **+ Add New Item** button.
- To import items in bulk, select the **⬆ Import Items** button (available only for the Intellectual Contributions screen).
- To delete a record, select the appropriate check box, then select the 🗑 button.

- To edit or view a record, click anywhere in the record row on the summary screen.
Note: Your Digital Measures Administrator may have added records to the system for you. These records can be viewed, but cannot be edited or deleted. The 🔒 *icon identifies these records. If revisions are needed to the records which have been entered on your behalf, contact your Digital Measures Administrator using the* **Help** *link.*
- To copy a record, select the appropriate check box, then select the [📄 Duplicate] button.

Saving Records

When working in the Digital Measures system, it is important that you capture your changes by selecting one of the Save buttons at the top of the screen. If you try to navigate away from a screen before saving your changes, a warning message will display asking if you would like to save your changes before proceeding.

Customizations

The screens available from the Manage Activities tab and all of the fields on them have been customized for Mays Business School and we can still change these as needed. To propose changes that you would like to see made, contact your Administrator using the Help link.


RUN REPORTS

This utility allows you to run reports that have been custom-built into the system. To run a report, simply select from the steps on the page. It's pretty self-explanatory. We will add more custom-built reports as we gain familiarity with Digital Measures and identify need.

DIGITAL MEASURES TIPS & FEATURES

The following key features will streamline data entry and reporting.

Expanding Text Boxes

You might see two diagonal lines in the bottom right corner of text boxes. Clicking this area and dragging will allow you to resize the text box as needed.
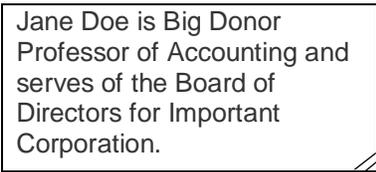
```
Jane Doe is Big Donor
Professor of Accounting and
serves of the Board of
Directors for Important
Corporation.
```

Import Citations from Other Systems

There is a good chance that citations of your publications are already stored in another database. Using these databases will cut down on the time required to get your publication record into Digital Measures. There are two ways for you to upload citations from another databases into Digital Measures.

1) **BibTeX**   BibTeX is the most broadly supported standardized way to format publication citations. The standard formatting makes it easy to move citations between software applications. Many common databases use BibTex, for example, Google Scholar, EndNote, Web of Science, etc. Each database allows you to select records, export them into a BibTeX file, and upload that file into Digital Measures. With a couple clicks of the mouse, you can upload your entire publication record.

   For more information on BibTeX Imports, CLICK HERE

2) **PubMed** You can import citations directly from PubMed by connecting to PubMed from within Digital Measures to search for and import your citations. *Given that few Mays faculty publish in medical journals, this guide does not provide details of how to use PubMed. For more information, contact the Administrator via the HELP button on the Left-Hand menu within Digital Measures.*

PasteBoard

Digital Measures has a tool called PasteBoard that is a real a time-saving feature. PasteBoard allows you to copy text from another document, such as your vita in Microsoft Word, and paste it into the PasteBoard. After you have pasted text into the PasteBoard, you can drag & drop part or all of the text into a Digital Measures field. That eliminates the need to toggle back and forth between Digital Measures and your CV as you fill in various fields on a Digital Measures screen.

To use this feature click the PasteBoard link in the left-hand menu under Manage Activities. A PasteBoard will appear in the bottom right-hand corner of your screen and can be dragged anywhere on the screen as needed. Any text you leave in the PasteBoard when you log out will be there in the PasteBoard for future sessions.

BIBTEX

BIBTEX OVERVIEW

There is a good chance that citations of your publications are already stored in another software system such as a reference manager or database including the following: EndNote, Google Scholar, Mendeley, RefWorks, Scopus, Web of Science, and Zotero. Those software systems enable you to pick records and then export them into a BibTeX file. This will allow you to upload you citations rather than enter all your citations manually. With BibTeX, you can upload one citation at a time or upload many citations at once using just one BibTeX file.

WHAT IS BIBTEX?

BibTeX is the most broadly supported standardized way to structure publication citations in a file. This makes it easy to move citations between two software applications. You export citations from one software application into a BibTeX file and then import that file into Digital Measures. Here is an example of what BibTeX looks like for one citation:

```
@article{Sh:1,
author = {Shelah, Saharon},
ams-subject = {(02.50)},
journal = {Israel Journal of Mathematics},
review = {MR 40-7102},
pages = {187--202},
title = {{Stable theories}},
volume = {7},
year = {1969},
},
```

EXPORTING PUBLICATIONS TO A BIBTEX FILE

This guide provides details on how to export publication information from the following common software systems. Click on any system for further step-by-step instructions.

- Google Scholar
- EndNote X6 (for Mac) or X7 (for Windows)
- EndNote Web
- Mendeley Desktop for Windows
- RefWorks
- Scopus
- Web of Science
- Zotero Online
- Zotero Standalone

Once you have created a BibTeX file, you upload it from within Digital Measures.

Google Scholar

Note: While it is possible to export specific citations within your Google scholar search results to BibTeX, the intention is that you would first aggregate your citations via Google Scholar Citations before you generate the BibTeX file. If you do not have a Google Scholar account, you will need to create one. Click here to find out more from Google. Click here to watch a YouTube video to walk you through the process.

Step 1: export citations to a BibTeX file:

1. Navigate to Google Scholar.
2. Select **My Citations**.
3. Log into Google by entering your credentials. Upon signing in you should land on your profile page where you will see a list of your "articles."
4. If you would like to export only select articles to your BibTeX file, choose these from your profile. If you would like to export all of your articles, simply leave things as they are.
5. In the **Actions** drop-down list choose to **Export** your articles.

6. On the **Export Articles** page, ensure that the **File Format** selected is **BibTeX**. Then select to export either the selected articles or all articles, depending on your need.
7. Save the export file.

For more information please see the [Google Scholar help guide](#).

EndNote X6 (for Mac) or X7 (for Windows)

Step 1: Ensure the BibTeX output style exists in EndNote.

EndNote does not come with a standard BibTeX output style. If one does not exist for your account, you will need to download and install this additional output style.

To download and install the BibTeX output style:

1. Go to [EndNote Output Styles.](#)
2. Search for "BibTeX"
3. Select the **Download** button for the BibTeX Export output style.
4. For instructions on installing output styles please see the notes on the right-hand side of the [EndNote Output Styles](#) page.

Step 2: Export citations to a BibTeX File.

1. Open EndNote.
2. Open the library of references that you would like to export to BibTeX.
3. Expand the drop-down list in the toolbar at the top of the screen that contains the placeholder "Select Another Style...", and select the **BibTeX** option. EndNote will now display the BibTeX-formatted citation in the preview screen.
   *Note: If BibTeX is not an option, follow the instructions in **Step 1** to download and install the output style.*
4. To complete the export of your selected citation information to a BibTeX File:
   1. Navigate to the **File** menu.
   2. Select **Export**.
   3. Enter your filename, choose where to save your exported file, and confirm that "BibTeX" is selected as the **Output Style**.
   4. Select **Save**.

EndNote Web

To export citations to a BibTeX file:

1. Log in to MyEndNoteWeb. You will land on the **My References** page.
2. To export your citations, navigate to **Format** and select the **Export References** link.
3. Under **References** choose the library of citations you would like to export.
4. Under **Export Style** choose **BibTeX Export**.
5. Select to save the export file.

For more information please see the EndNote Web help guide.

Mendeley Desktop for Windows

Note: If Mendeley is your primary reference manager we recommend setting up "BibTeX Syncing" to streamline the maintenance of your BibTeX file of citations. BibTeX Syncing enables you to keep the content of one or more BibTeX files synced with your Mendeley library.

To set up BibTeX Syncing:

1. Open Mendeley Desktop for Windows.
2. Navigate to **Tools** and select **Options**.
3. Select the **BibTeX** tab.
4. Under **BibTeX Syncing** select **Enable BibTeX syncing**.
5. Choose whether you would like to create one BibTeX file for your whole Mendeley library, one file per collection or one file per document.
6. Select the path the location on your computer to which your BibTeX file(s) should be stored.
7. Select **Apply** to save your new settings.

With BibTeX Sync enabled in Mendeley Desktop for Windows you can retrieve your BibTeX file(s) by navigating to the location on your computer where you have directed Mendeley to save those files.

If you do not have BibTeX syncing enabled, or would prefer to create a new BibTeX file from your selected citations, you can follow these steps:

To export citations to a BibTeX file:

1. Within Mendeley Desktop for Windows, select your preferred folder under **My Library**.
2. Select the citations you would like to export from the center pane. One easy way to do this is to right-click on one of the citations in that pane and choose the **Select All** option in the resulting menu. Another option is to select the first citation, hold Shift on your keyboard and then select the last citation with your mouse.
3. Navigate to the **File** menu and select the **Export** option.
4. Save the resulting .bib file to your preferred location.

For more information please see HOWTO: User Mendeley to create citations using LaTeX and BibTeX.

RefWorks

To export citations to a BibTeX file:

1. Log into RefWorks.
2. Navigate to **References** or **Tools** and select **Export**.
3. Choose to export **All References** or a specific folder.
4. Select **BibTeX** as your **Export Format**.
5. Select **Export to Text File**.
6. Save the resulting file as a .bib file to your preferred location.

For more information please see the RefWorks help documentation.

Scopus

To export citations to a BibTeX file:

1. Choose the references you would like to export and then select **Export**.
2. Select the **BibTeX** export format.

3. Select to include the **Complete format** for the items in your export.
4. Select **Export**.
5. Save the resulting file to your preferred location.

For more information, please see the [Scopus help guide](#).

Web of Science

To export citations to a BibTeX file:

1. Navigate to the **Results** page and choose the records you would like to export.
2. Select to include the **Full Record** for each item in your export.
3. In the **Save To** menu select the **BibTeX** file format.
4. Select **Save** to proceed.
5. In the resulting dialog box select **Save** or **OK**.
6. Save the resulting file to your preferred location.

For more information, please see the [Web of Science support materials](#).

Zotero Online

To export citations to a BibTeX file:

1. Navigate to [Zotero's homepage](#) and log in to your account.
2. In the menu bar select **My Library** and from the list on the left-hand side, select the citation collection from which you would like to export.
3. In the pane on the right select the citations you would like to export.
4. Select the **Export** icon, which appears just above the **Date Modified** column.
5. Select the **BibTeX** output option.
6. Select to save the file.
7. Navigate to the location where the file was saved.
8. Rename the file and add a ".bib" or ".txt" extension (e.g., FacultyNameZoteroExport.bib).

For more information, please see the [Zotero Online help guide](#).

Zotero Standalone

To export citations to a BibTeX file:

1. Within **My Library** in Zotero Standalone select the collection from which you would like to export.
2. *If you are using a Mac*, select the Settings gear icon and choose **Export Library…** from the menu.

   If you are using a PC, right click on the collection you would like to export and select **Export Collection** *or* select the collection from the list and go to **File** and select **Export Library…** from the menu.
3. In the **Export…** box select **BibTeX** as your format and select **OK**.
4. Save the resulting file to your preferred location.

For more information please see the Zotero help guide through Zotero Standalone.

Disclaimer: These instructions may not reflect the reference points or specific sequence required for the creation of a BibTeX file in all versions of these tools. If you notice any discrepancies between your view of the tool and our instructions, we recommend reviewing the resources for the system you are interested in - many of which are linked to above - or searching for additional online resources regarding "exporting records to BibTeX" or something similar.

UPLOADING PUBLICATION DATA

Step 1: Upload a BibTeX File

- From the Left-Hand Menu select **Manage Activities**

- Select **Publications** from the **Scholarship / Research** section of the screen.

- Find the button labeled **Import**. Select this button.

This will open up the following box.

- Click **Choose File**
- Navigate to the BibTeX file on your computer
- Click **Continue.**
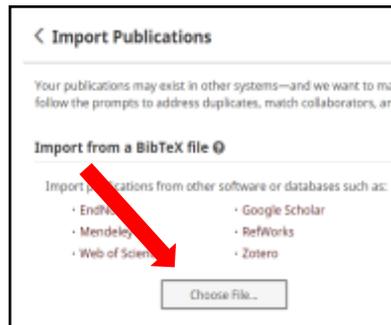
For details about how to create a BibTeX file from common software applications, see [EXPORTING PUBLICATIONS TO A BIBTEX FILE](#), above.

Step 2: Handle Duplicates

Digital Measures uses advanced duplicate detection logic to check the records from the file to see if any might already be in the system. We do not want duplicates! The records that might be duplicates are presented to you to review as seen below.

As you can see from the screen shot above, Digital Measures identified one potential duplicate – **Publication in system** (listed on the left) matches the **Publication from import file** (listed on the right). For each potential duplicate, select **Skip** (to acknowledge that it is a duplicate) or **Import** (to acknowledge that this is NOT a duplicate).

You can limit the records that are displayed to all records or only those that still need review using the drop-down menu at the top of the screen.

Once you have indicated whether each record *is* or *is not* a duplicate, a **Continue** button will become available for you to select.

Note: if you inadvertently upload a duplicate, you can go back later and simply delete the item.

Step 3: Pick Collaborators

Now we link the uploaded citations to your Digital Measures account and to any other coauthors listed in the BibTeX file who are _Mays faculty_ and who have user accounts in Digital Measures. For each uploaded item in the BibTeX file, the screen will report two lists:

1) **XX names matched user accounts**. These are names in the BibTeX file that "match" names of existing Mays faculty.

2) **XX names did not match any user accounts**. These are names in the BibTeX file that do not match existing Mays faculty. Digital Measures looks for _exact_ matches and so might not identify a name as a match because of initials or hyphenated names, etc. Thus, you need to verify each match and each non-match.

See the following graphic where Digital Measures found 1 match and 3 non-matches.

Names on the MATCH list:

- If the name listed as a match is a match – do nothing for that name.

- If a name listed as a match is _not_ a Mays co-author, use the link to the right of the name: **Select a different user account** and you will see a drop down list of all Digital Measures users at Mays. Find the correct name and click OK.

If your Mays co-author's name is not on the list, click **No Match**. Then, use the HELP button on the Left-Hand menu and report the problem.

Note: If you match a citation to another Mays faculty, their Digital Measures record is automatically updated too. So, your co-authors may have already uploaded items for you. In that case, you might get a "duplicate" warning when you try to upload that same item (see Step 2, above).

Names on the NO-MATCH list:

- If the name listed as no-match is not a match – do nothing.

- If a name listed as no-match is in fact a Mays co-author, use the link to the right of the name: **Match to user account** and you will see a drop down list of all Digital Measures users at Mays. Find the correct name and click it. This will display a message **Now matched to XXX**.

If your co-author's name is not on the list, click **No Match**. Then, use the HELP button on the Left-Hand menu and report the problem.

- The names that are not matched will still say **Match to user account**, which means that they are not matched to Mays faculty; they are non-Mays coauthors.

Note: In order to proceed, you must resolve all of the names on the list for each publication.

Step 4: Review Records and Import

This step enables you to flip through the records that you are about to load, to look them over to ensure everything looks good. Use the forward and reverse arrows to move through the records. When you are satisfied that everything looks good, select the **Finish Import** button.

Digital Measures presents a final confirmation box to ensure you wish to proceed. Select **Import Records** to continue.

Note: It is easy after the fact to delete items. If you import an item in error, simply use the 🗑 button.

Import Complete

The records are loaded into Digital Measures immediately and you will see the text **X records successfully imported.**