

Metrics

Performance Metrics Tracking System

Metrics: Performance Metrics Tracking System

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Chapter 1. Structure of the Metrics System

The Metrics System comprises two main components:

1. A client/server database which stores primary data and summary metric “scores”. The server database runs on a centralised server, hosted by the IT department. The client applications connect to this server via the network, and allow you to add, view or change data.
2. A “rich internet application” known as the *Dashboard* which collates and processes this data to produce charts representing the metric data.

Storing your metric data

Data in the metric database is stored in three main ways:

1. For some sections, data is stored in the system in its raw or simplest form. This data is then processed and summarised by the system to produce the metrics scores and Charts. Education is one example of this – enrollment and completion records are created for each individual enrollment or completion. Not all information recorded in the raw data is available for Charting.
2. In other sections, intermediary tables are provided to store summary data for a specific time period: eg: Annual financial statements. This summary data is then collated and processed automatically to produce the metric Charts. The base data itself is not stored within the system, just a summary of the data, which is then itself processed to produce the metric scores and Charts. Finance is one example of this – records are created containing summary data for each financial year.
3. The third method of storing data, and the most common, is as a “custom metric”. In these cases, only a summary metric “score” is recorded, along with a date and unit ID.

Chapter 2. Organising your metric data for charting

There are two main ways of grouping data within the system - by organisational structure and by time (or date). The metric data is summarised with these groupings for both a sum of the data entered and an average.

Grouping by Organisational structure

The Organisational structure can be customized extensively within the database, but it's important to understand how each of the structural levels relate to one another.

- At the highest level, there are *institutions* such as *Baker IDI*. You can have any number of institutions within the system.
- Within each institution there are *divisions*. This could be a research division, such as *Cardiology & Therapeutics*, or an administrative division, such as *Commercialisation*. You can have any number of divisions within an institution. Divisions are categorised as *Research*, *Health*, or *RSA* (Research Support and Administration)
- Within each division there are *units*. For a research division, this would probably be a laboratory, such as *Vascular Pharmacology* or *Experimental Cardiology*. For an administrative division, it could be a support unit such as *HR*, *IT* or *Media*. You can have any number of units within a division.

Because of the relationship between these entities, you can “roll up” summary data by following the links. For example: When the data is associated with a unit ID, you can then also group that data by division and institute by utilising the relationship between the structural entities. The total score for a metric for a division (eg: Number of Publications) will be the sum of the scores of the units within that division. The total score for an institution would be the sum of the scores from the divisions within that institute (which would be the sum of the scores from the units within those divisions). So by assigning a unit ID to a score or record, you can use any of the following groupings when Charting:

- By Unit
- By Division
- By Division Category
- By Institution
- By Category

Grouping by Time (or date)

The second main method of grouping data within the system is by time , or more specifically date. Each metric allows some sort of date to be entered. In the case of custom metrics, the date allows the system to calculate the month, quarter, and the year. This structure allows the following groupings when Charting:

- By Quarter
- By Month
- By Year

There are also metric-specific groupings, such as by Course, Status (Year of Study - eg: 1st Year, 2nd Year etc), and by University for the Education metrics.

Filtering your Data

In addition to grouping your data, you also have the option of filtering your data.

Filtering data reduces the amount of data displayed.

Example 2.1. Filtering Grouped Data

One common use of filtering is to look at the units within a division.

If you wanted to look at the metrics scores grouped by unit, you would see all the units within the system. Often, you may only be interested in the units within a particular division.

To do this, you would setup the chart to group by unit (since you want to see the data for each unit) but filter by Division. You then specify the division you're interested in, and the chart will show the scored grouped by unit, but only for the Division you have specified.

Figure 2.1. Filtering your results - Example

The screenshot shows a chart configuration window with the following settings:

- Chart ID: GRA81
- Chart Type: Other
- Title: Completions by Lab
- Main Axis Title: # Completions
- Alt. Axis Title: (empty)
- Group By: Unit
- Filter By: Division (Cardiology & Therapeutics)
- Filter Value: DIV1
- Buttons: Add Series, Delete Series, Duplicate Chart
- Links to: COM

Metric ID	Type	Format	Summarise By	Title
STCC	Column	Integer	Count	Completions

Definition: (empty)
Purpose: (empty)
Target: (empty)
Analysis: (empty)

Section: Education

Sort Order: 22
 Chart is Disabled (will not be displayed in section if box is checked)

Restrict to: Select...

Course completions - Grouped by Unit, but restricted by Filter to only the Cardiology & Therapeutics Division

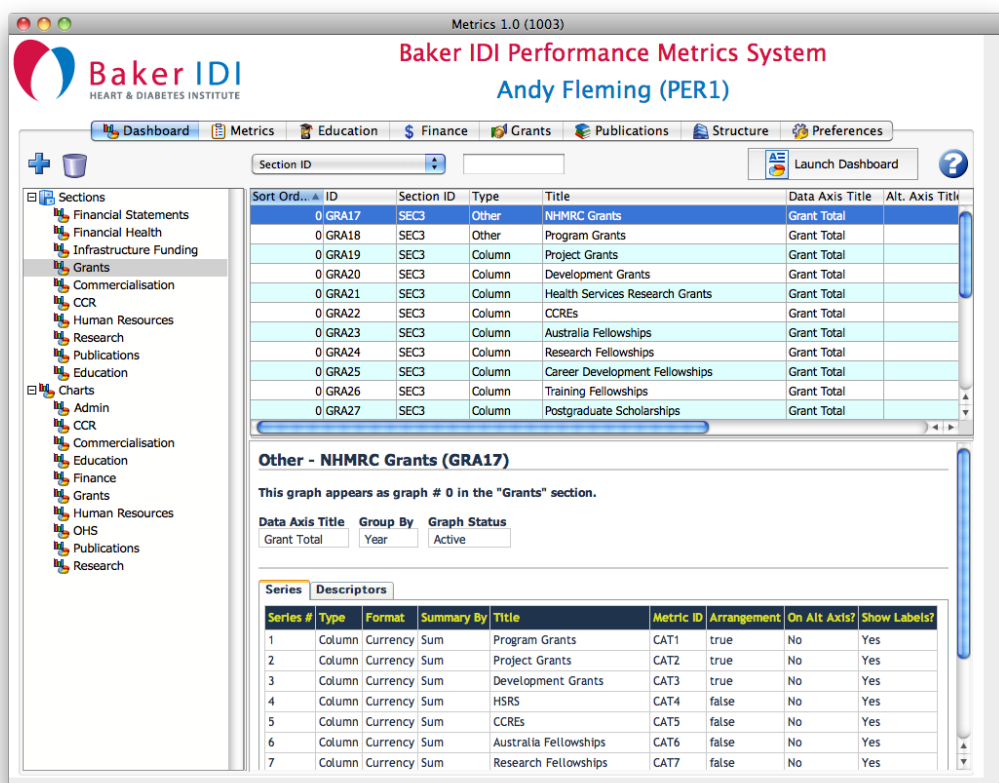
Chapter 3. System Layout and Interface elements

Main Navigation Window

The main Metrics window (shown below) is made up of 3 main areas:

1. Section Tabs
2. Item List
3. Record List & Preview

Figure 3.1. The main Metrics window



Section Tabs

The section tabs are used to select which aspect of the system you're currently working with.

Figure 3.2. Section tabs from the main Metrics window

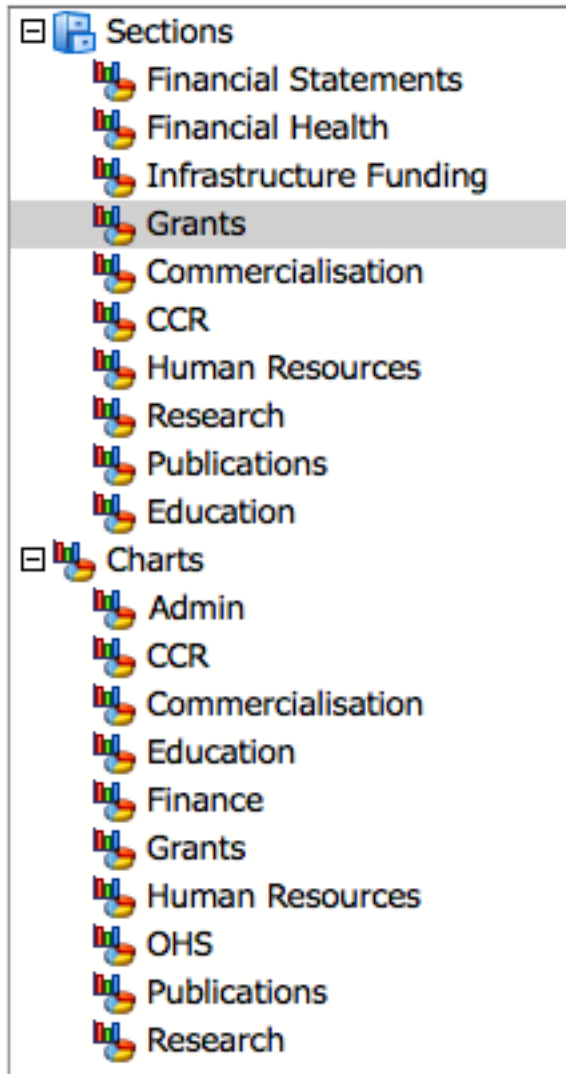


Changing the selected tab changes the item list, allowing you to select and preview records relevant to the selected section.

Item List

The Item list shows what record types or group of record types are available.

Figure 3.3. Item list from the main Metrics window - User's tab selected



Clicking on a list item updates the records which are displayed in the record list. In some cases, a list item may represent a selection or subselection of records.

Record List & Preview

The record list is exactly that - a list of available records. The records displayed depend on the currently selected item in the item list. Clicking on one of the records in the list at the top updates the preview in the bottom half of the window, as shown below:

Figure 3.4. Record list and a preview of the selected record

Sort Ord...	ID	Section ID	Type	Title	Data Axis Title	Alt. Axis Title
0	GRA17	SEC3	Other	NHMRC Grants	Grant Total	
0	GRA18	SEC3	Other	Program Grants	Grant Total	
0	GRA19	SEC3	Column	Project Grants	Grant Total	
0	GRA20	SEC3	Column	Development Grants	Grant Total	
0	GRA21	SEC3	Column	Health Services Research Grants	Grant Total	
0	GRA22	SEC3	Column	CCREs	Grant Total	
0	GRA23	SEC3	Column	Australia Fellowships	Grant Total	
0	GRA24	SEC3	Column	Research Fellowships	Grant Total	
0	GRA25	SEC3	Column	Career Development Fellowships	Grant Total	
0	GRA26	SEC3	Column	Training Fellowships	Grant Total	
0	GRA27	SEC3	Column	Postgraduate Scholarships	Grant Total	

Other - NHMRC Grants (GRA17)

This graph appears as graph # 0 in the "Grants" section.

Data Axis Title **Group By** **Graph Status**

Series		Descriptors							
Series #	Type	Format	Summary By	Title	Metric ID	Arrangement	On Alt Axis?	Show Labels?	
1	Column	Currency	Sum	Program Grants	CAT1	true	No	Yes	
2	Column	Currency	Sum	Project Grants	CAT2	true	No	Yes	
3	Column	Currency	Sum	Development Grants	CAT3	true	No	Yes	
4	Column	Currency	Sum	HSRS	CAT4	false	No	Yes	
5	Column	Currency	Sum	CCREs	CAT5	false	No	Yes	
6	Column	Currency	Sum	Australia Fellowships	CAT6	false	No	Yes	
7	Column	Currency	Sum	Research Fellowships	CAT7	false	No	Yes	

The record list (upper section) and a preview of the selected record in the list (lower section)

Many of the previews include tabs, which you can click on to reveal additional information relating to the selected record.

Buttons and Quickfilters

There are a number of other elements of the interface which you will use on a regular basis. These fall into two main categories, *Buttons* and *Quickfilters*

Buttons

There are three main buttons which are available throughout the system:

Plus button

Add a new record

Figure 3.5. Add new record (Plus) button



If you have permission to add records, or if that function is permitted in the current context of the program, the button will be enabled.

If enabled and clicked, the system will create a new record of the type you have currently selected in the Item list.

Trash button

Delete the selected record(s)

Figure 3.6. Delete (Trash) button



In some places it is not permitted to delete records, due to inheritance and dependencies within the structure of the data. For this reason, this button is often inactive.

If enabled and clicked, the system will, after confirming with you, delete the currently selected records from the record list.



You can NOT undo this deletion

Make sure you have the correct records selected and are 100% sure you want to permanently delete them from the system.

Help button

Launch the Help system

Figure 3.7. Help button



The Help button is almost always available - you never know when you might need help!

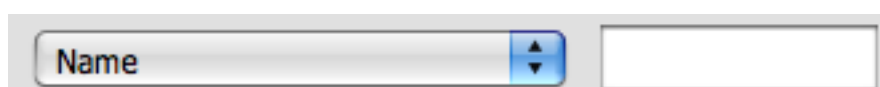
Clicking the Help will launch the Metrics help system.

Quickfilters

As you work with various record lists, it's quite likely you'll be looking for a specific record or records, or wanting to compare records with similar characteristics. To make this easier, the Quickfilter box can be used to reduce the number of records displayed in the list.

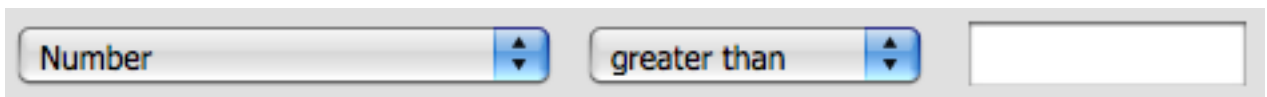
To use a text field Quickfilter, select the field from the popup by which you wish to filter the displayed records, then type the information to match into the box. The selection of records displayed will change to include only those which match the information you have entered.

Figure 3.8. Quickfilter on a text field



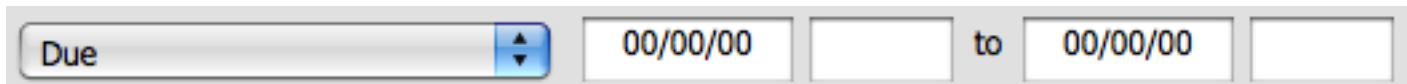
The text Quickfilter uses a "wild card" search not an exact match. Eg: "finance" will return records matching "finance" as well as "refinance".

Figure 3.9. Quickfilter on a number field



To use a number field Quickfilter, select a comparison operator using the second popup menu then enter the numeric value in the number field

Figure 3.10. Quickfilter on a date field



To use a date field Quickfilter, specify both the start and end dates to provide a range. To find a specific date, enter it in both fields.

Contextually aware elements

Many buttons and other elements within the system are context aware - they will be active or inactive (or visible or invisible) depending on a range of factors such as:

- The current user's group membership - if you do not have permission to add records, or if new records must be added from another part of the system, the Plus button will appear inactive, or greyed out.
- The current workflow position:
 - what operation you are currently completing?
 - is what you are trying to do valid given the current circumstance?
- The value of a selected tab or item list item - when adding or deleting a record, the type of record that is added or deleted depends upon the selection in the section tabs and the item list.
- The value of a field or fields - when editing records, the value of a field may prevent you from doing a particular thing?

Figure 3.11. Example of button states depending on context



The Add record button - enabled



The Add record button - disabled

Other aspects of the system are also context aware, but on a broader scale. Depending on the group memberships of the current user, some tabs may not be shown, or may be restricted to read only access.

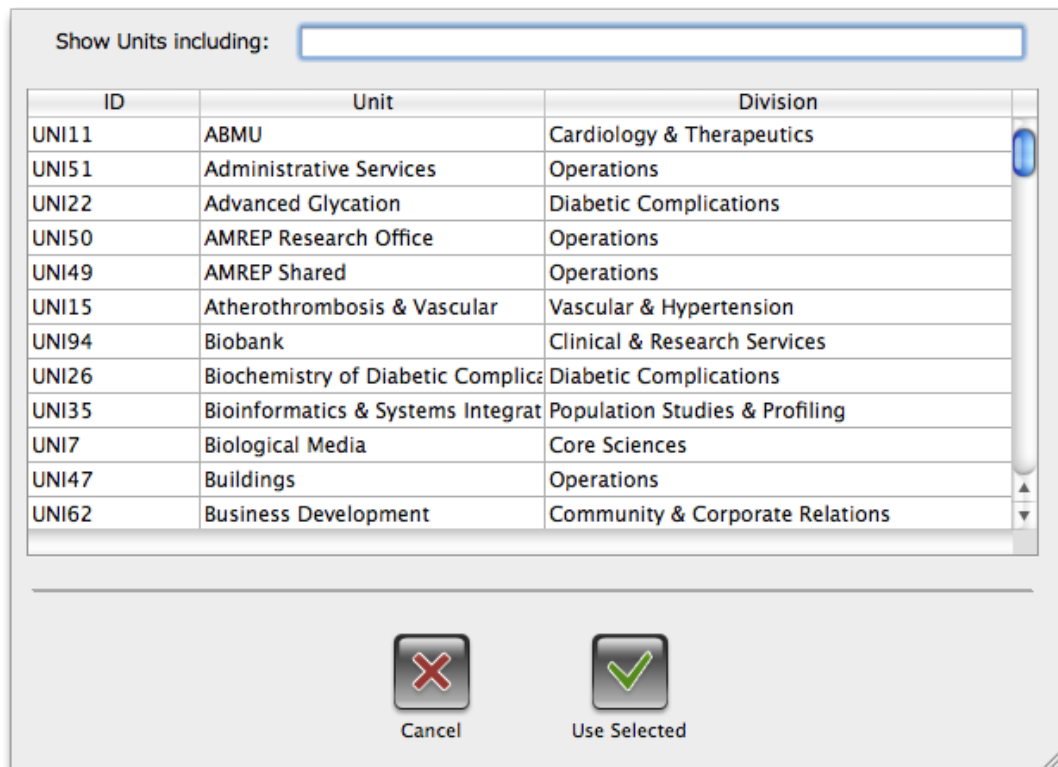
The contextually aware interface controls are intended to ensure that the correct workflows are followed, and that all prerequisite data is present before an operation is completed.

Filter Pickers

In some situations, the number of possible alternatives makes a popup menu unusably long. To overcome this, "Filter Pickers" have been implemented when it is necessary to select one of a large number of options - such as one of the custom metrics, or a unit.

The filter picker operation is very straightforward. Click the button to indicate you need to make a new selection - the filter picker will appear.

Figure 3.12. Filter Picker - unfiltered

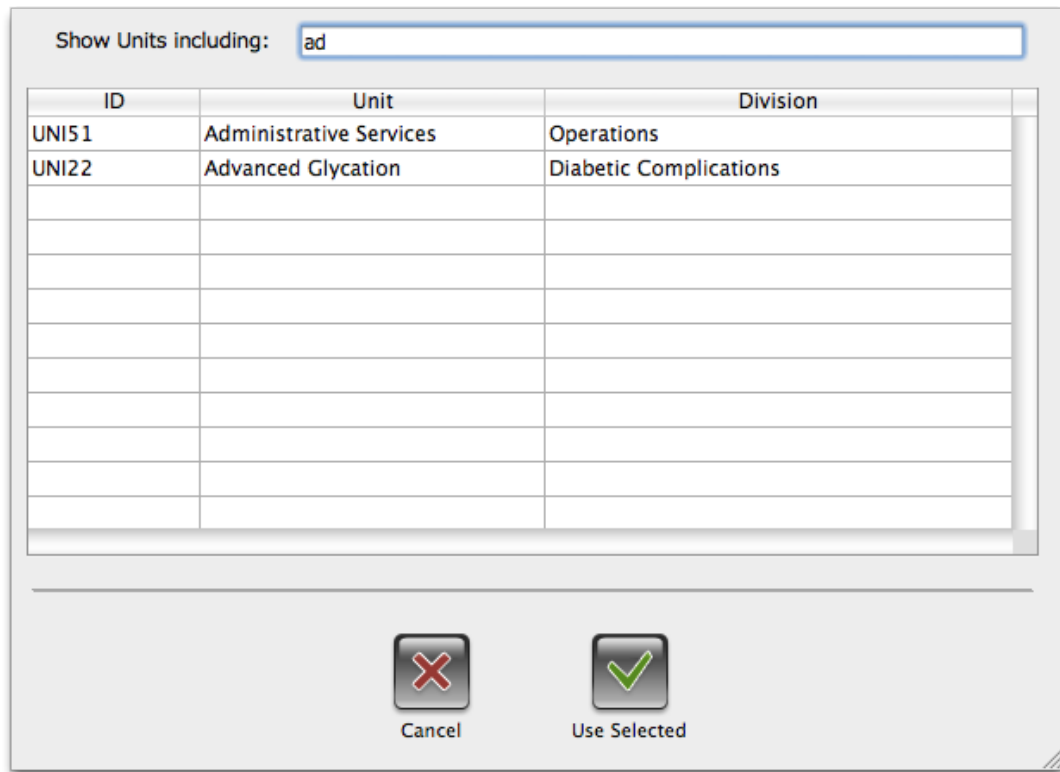


The Filter Picker on first load, showing all available records.

As you can see, all the available records are displayed, with a number of fields shown.

To activate the filter, begin typing into the text box. As you type, the system processes the text and reduces the selection of records to only those which have the text you've entered in one (or more) of the fields that are displayed.

Figure 3.13. Filter Picker - with filtering



The Filter Picker filtering the available records to show only those matching the entered text.

When you see the record you're after, either double-click on the record or click on the record and click the Use Selected button to select the record.

Chapter 4. Dashboard

The Charts are presented in a web-based application using Flex technology. This application is known generically as the dashboard. When the dashboard launches, the Flex application connects to the database and builds a number of *result sets* by querying the data you've entered in the system.

There are two components to the dashboard: Sections and Charts. In the backend database, the Dashboard tab gives you access to the records which store information about the charts and sections which make up the Metrics Dashboard in the Flex application.

The information entered in these records determines what and where information appears in the dashboard. As the dashboard is data driven (constructed based on data you have entered, rather than "hard-coded" by the developers), users with the necessary access have complete control over the sections and charts which appear in the dashboard.

Sections

Each section record (when enabled) will create a new accordion section in the accordion navigation item on the left hand side of the dashboard window.



Tabs do not equate to sections

There is *not* a direct correlation between the tabs in the database (which relate to the tables within the database) and the tabs in the navigation - the tabs that appear in the dashboard accordion are user defined based on the Sections (see above), and may or may not correspond to the structure of the database, depending on how you set it up.

Charts

When you create Chart records in the system and assign them to a section, the Chart will be displayed as a selectable item within an accordion section in the dashboard.



Fill in all the fields!

When creating a new Chart, all fields should be filled in - failing to enter any of the values in the chart may result in nothing being drawn in the dashboard

- Chart Type – this tells the Chart how you want the data represented. The available options are:
 - Other - this is the default chart type, and can be a column chart, a line chart, or a combination of both. The primary group axis runs across the bottom of the charts with the series displayed as vertical columns.
 - Pie - a pie chart represents the data as a proportion of the whole, with values being converted into percentage chunks of the total.
 - Bar - a bar chart is very similar to a column chart, but has the group axis vertically with the series displayed as horizontal bars.



Your chart type must match your series!

You cannot display bar series on an other (column) chart, or column series on a bar chart.

You can only display pie series on a pie chart.

Line series may be used on either a bar or a column chart, but not a pie chart.

- Title – the title displayed for the Chart – the label for the item within the section.
- Main Axis Title – the title associated with the primary data axis.
- Alt. Axis Title – the title associated with the alternate data axis (if used).
- Group By – this tells the Chart how to group the data, and acts as the group axis title.
- Filter By – You can optionally restrict the grouped data by specifying a filter category. If you select a filter type, an additional popup menu will appear to allow you to specify which item of that category you wish to filter the data by.

Currently, you are restricted to a single category using menu, but you can manually enter the ID to restrict to more than one category. Please contact Halogenics for additional information regarding this capability.

- Series – Each chart must have one or more series. Each series this tells the Chart where to get the data from, and how it should be represented. More information regarding Series is available in the next section.
- Definition – a one line description of the Chart.
- Purpose – what the Chart is intended to show or demonstrate.
- Target – a one line statement describing the target score for the metric.
- Analysis – interpretation of what the Chart shows.
- Section – this tells the system which section the Chart should appear in.
- Sort order – the sort order determines the order the Charts appear in within the nominated section.
- Chart is Disabled – if this box is checked, the Chart will not show up in the nominated section.
- Restrict to – if selected, anyone not in the nominated group will be unable to save changes on this Chart record within the database.



Retrict to refers to editing the chart data, not viewing the chart

Setting this value will not prevent anyone from seeing the chart in the dashboard. If the chart is enabled and associated with an enabled section, the chart will be visible to anyone viewing the dashboard. Only members of the nominated group will be able to make changes to the chart setup in the backend database.

Other features:

- Duplicate Chart button – this is useful if you want to present the same data with a different grouping (eg Widgets by Unit and Widgets by Division). Click the button to create a duplicate copy of the Chart and any associated series. You can then change the Group By, Title and the Sort order and you have a “new” Chart!
- Add Series button - this adds a new series to the chart
- Delete Series button - this deletes the highlighted/selected series from the chart.
- Clear Section button – clears the field which associates a chart with a section, but without altering the chart. This would effectively "hide" the chart, as it needs a section to appear in the dashboard.
- Clear Restriction button – clears the Restrict to value, removing the access restrictions for the chart.

- Links to - this feature is deprecated. In the previous version of the software, this field contained the metric ID that the chart was based on. In this version of the software, that information is stored with each series (see below).

Series

As mentioned previously each chart must have one or more series (otherwise it's just a pair of axes with some labels!)

Each series has a number of properties you can set. These are include:

- Sort order - the value in this field determines the order that the series associated with a chart will appear in.
- Metric - What category or type of metric will be used for the data for this series? This will be one of the following:
 - Custom - data is one of the custom metrics entered into the system under the Metrics tab.
 - Balance - data is one of the fields in the annual balance data records under the Finance tab.
 - DIIRD - data is one of the fields in the annual DIIRD funding data records under the Finance tab.
 - Education - data will be taken from the student records under the Education tab.
 - Grant - data is from the grant information entered under the Grants tab.
 - Health - data is one of the fields in the financial health data records under the Finance tab.
 - Income - data is one of the fields in the annual budget/actual income data records under the Finance tab.
 - Publication - data is taken from the records entered under the Publications tab.
- Data Series from - which metric or field does this series represent. By taking this value in conjunction with the Group By value on the chart, the system knows which dataset to use to draw the series. In the case of custom metrics, you can select the metric by title from the popup menu. For education, finance, grants or publication metrics you will need to use the "hard coded" metric dataset value - see the appropriate chapter later in this manual for further information.
- Type - will this be a column, bar, line or pie series?
- Title - What title or label should be associated with this series
- Format - What units are the data from this series measured in? The selection here tells the Chart how to represent the series data it will be drawing, and how to format the axes. Possible formats are:
 - Integer (whole number – no decimal places, thousands seperators used) – eg: 123,456
 - Real (number with decimal places) – eg: 123,456.78
 - Currency (real value, with \$ signs and comma delimiters inserted as appropriate) - eg: \$123,456.78
 - Percentage (real value, with comma delimiters and a trailing % sign) - eg: 12.34%
- Summary Function - how should the data be processed?
 - Sum - What is the total value of the selected records - eg: Total of grant funding received.
 - Average - What is the average (mean) value of the selected scores - eg: Average Impact Factor of Publications.

- Count - How many records of this type are found - eg: How many students are enrolled.
- Arrangement - You have a number of choices as to how the series should be arranged. These include:
 - clustered - series are arranged side by side - the "normal" multicolumn or multibar chart.
 - stacked - series are placed one on top of the other, with each starting where the previous series finished, giving you a cumulative total for all the series
 - 100% - series are placed one on top of the other, but are totalled to 100%. This allows you to look at the *proportion* of the data that a series represents (similar to what a pie chart does)
 - overlaid - series are placed over the top of one another, but all starting from the same point. Note: Some series may be hidden behind other series.
- Show data label - this checkbox determines whether the value of the series should be shown on the chart. If checked, the value will be shown. If there are a large number of series, the scores are very similar or you simply don't want the numbers appearing, leave this checkbox empty.
- Display on alternate axis - in some circumstances, the values of each series may be very different. If this is the case, plotting both charts on the same axis will make one or more of the series very difficult to read. For example, if you're comparing total funding (in millions of dollars) as a column to staff numbers (in the hundreds) as a line series on the same axis, the staff number line will appear almost straight and flat along the bottom of the chart, because a couple of hundred out of several million won't appear to be very different. If you select the Display on Alternate Axis checkbox, the chart will be drawn with one axis using a scale of millions, and the alternate axis with a scale of hundreds, meaning you will actually be able to read and interpret the values for the staff numbers.



The last series added to each axis determines the scale

The axes are rendered based on the last series which is associated with an axis.

If you have more than two series, you should use the sort order to ensure that the last series rendered has an appropriate scale to display all series which need to use that axis.

Chapter 5. Metrics

The metric form itself is very straightforward.

Each metric is given a label and a description. You are then able to add any number of data records which will be associated with that metric.

Other than the data list (which shows any existing data records associated with the metric - double click to edit a record) the following buttons are available:

- Add Data - this button creates a new data record and automatically associates it with the metric you're currently looking at.
- Delete Selected - when a data record is selected in the list, clicking this button will delete the data record from the system.
- Add graph - this button will generate a new chart and automatically create the first series using the currently selected metric.
- Restrict modification to – if selected, anyone not in the nominated group will be unable to save changes on this metric record .
- Clear Restriction button – clears the Restrict to value, removing the access restrictions for the chart.

The Metric Data Form

The metric data form only has a couple of fields that you can enter, with the remainder being done automatically. These additional automatic values are used for various groupings based on the values you enter, as explained below.

- Unit - this selection associates the data with one of the units in the system. This also allows the data to be used for the division, division category and institution groupings, by following the unit record's associations.
- Clear Unit - clears any unit selected, disassociating the data.
- Data/Score - this is the metric value itself.
- Date - this date is used to calculate all the time-based series groupings, such as Year, Quarter and Month values
- Data is disabled - if selected, this data record will NOT be taken into account when the metric datasets are compiled by the system. This is intended for use when a score is provisional or is not able to be released (for whatever reason) at the current time.

Chapter 6. Education

The Education metrics deal with student enrollments at the Institute.

Unlike most of the other sections, the Metrics system is the primary repository for the education data.

This information is stored in five tables:

- Students - records information about each student enrollment
- Scholarships
- Funding
- Reports

Students

The following datasets are available in relation to the student metrics:

- Course - what course is/was the student enrolled in?
- Unit - what unit is/was the student a member of?
- Division - what division is/was the student a member of?
- University - what university or institution is/was the student enrolled in?
- Status - what year is the student currently completing (eg: First year, Second Year etc). This is calculated by subtracting the year the student began their course from the current year, and adding 1

The status will be updated automatically when a record is opened, or can be updated for all current students via the Admin menu.

Student Scholarships

Each student may have one or more Scholarships during their study.

Each scholarship record contains:

- The name or title of the scholarship.
- To body providing the scholarship.
- The start date of the scholarship.
- The end date of the scholarship.

Student Funding

The funding table allows you to record additional information regarding funding for the student, you can record a source and amount of the additional funding for your reference purposes.

Student Reports

The reports table simply stores the date that the student reports were received.

Documents

Documents associated with the student (eg: reports).

Chapter 7. Finance

The finance metrics deal with the budgeted and actual revenue and balance figures for the institute.

The finance metrics are split into four categories, to match the sets of data provided for the annual and other reports. These are:

- Income (budgeted and actual)
- Balance (assets, liabilities and reserves)
- Health (revenue and balance)
- DIIRD (research grant funding, DIIRD & IRIISS totals and percentages)

Income

The income data form is very straightforward, taking the following values (recorded annually):

- Year - the year the income data is from.
- Budgeted Revenue - the expected total revenue for the year entered.
- Budgeted Balance - the expected balance for the year entered.
- Actual Revenue - the actual total revenue recorded for the year entered.
- Actual Balance - the actual balance recorded for the year entered.

Balance

The balance form is a summary of the financial status of the institute, and includes the following totals:

- Year - the year the balance data is for
- Total Funds
- Total Assets
- Total Liabilities
- Total Current Assets
- Total Current Liabilities
- Investments - Market Value
- Investments - Cost
- Fair Value Reserve
- Annual Leave
- Long Service Leave (Current)
- Long Service Leave (Non-Current)
- Prepaid Income
- Cash at Bank

- Term Deposits

Health

The health data shows the monthly revenue and surplus for the Institute, and includes the following totals:

- Budgeted Revenue - the expected total revenue for the month.
- Budgeted Balance - the expected balance for the month.
- Actual Revenue - the actual total revenue recorded for the month.
- Actual Balance - the actual balance recorded for the month.

DIIRD

The DIIRD examines research grant funding, DIIRD & IRIISS totals and the percentage breakdown of these values. The data in this table includes the following totals:

- Year - the year the data is for.
- Research Grant Funding - as reported in the OIS survey
- DIIRD Funding - the total value of DIIRD funding awarded
- % IRIISS to Research Grant Funding - what percentage of the total Research Grant Funding does the IRIISS funding represent?
- % DIIRD to Research Grant Funding - what percentage of the total Research Grant Funding does the DIIRD funding represent?
- % DIIRD & IRIISS to Research Grant Funding - this value is calculated automatically based on the previous two categories.

Chapter 8. Grants

The grants metrics deal with the amounts of external funding received. These are stored in a simple hierarchical arrangement, structured as follows:

At the top level there are Granting Bodies, such as NHMRC, DART or the NHF.

Each of these Bodies then has one or more Grant Categories associated with it. To add a grant category, open the record for the granting body and click the Add Category button. Select the Granting Body from the popup menu, give the new grant category a name and save the record.

To add a grant amount for a given year, you open the record for the Grant Category and click the Add Grant button. This presents you with a simple record where you enter the year for the grant, and the amount. This value is then automatically associated with the Grant Category, and thus the Granting Body.

Chapter 9. Publications

The publications metrics record the year, total number of journal articles, total number of publications and average impact factor for each Institute.

- Journal Articles
- Total Publications
- Average Impact Factor of Publications

All these metrics must use a summary function of *Sum*, and be grouped by *Institution*.



Don't enter internal publication data here

This section compares the publishing performance *between Institutions* only.

To enter data for units and divisions, use the custom metrics system.

Chapter 10. Structure

The structure allows you to easily define your organisational structure within the metrics system.

This is important, as it is this structure which allows you to summarise metrics by the broader division and institute categories (See Grouping by Organisational Structure for more information.)

- Institutions - The top level of the structure is the Institute.
- Divisions - The second level of the structure is the Division. Each Institute may have one or more divisions.
- Units - The third level of the structure is the Unit. Each Division may have one or more units.

Chapter 11. Importing & Exporting Data

Importing Data

You can import data into the system by selecting Import Data from the File menu

For further information about the data import system, please contact Halogenics.

Exporting Data

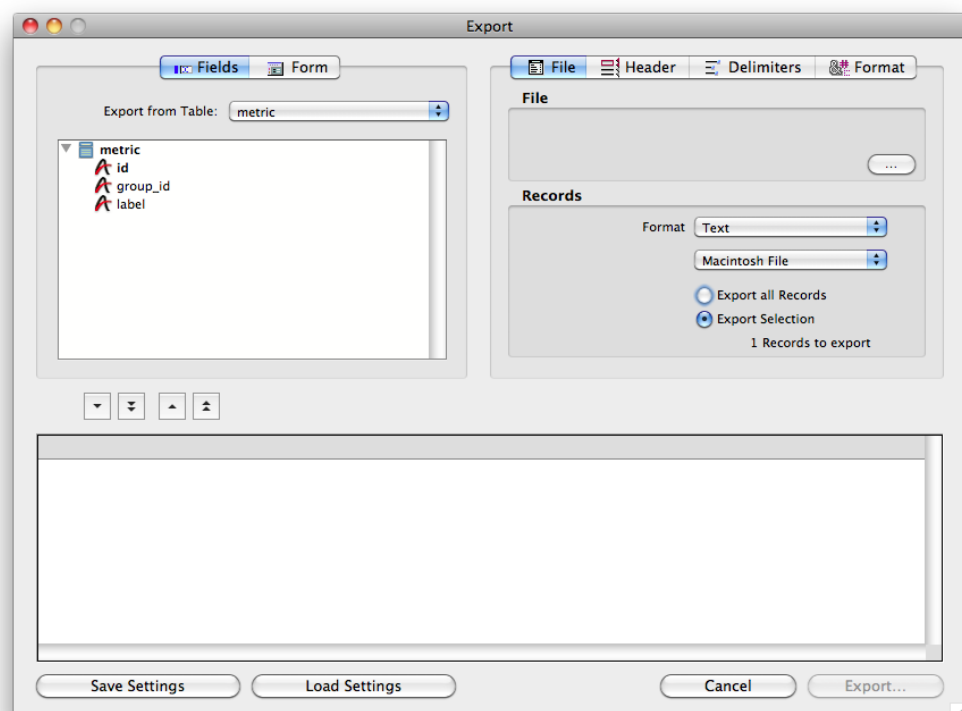
You can export data into the system by selecting either Export Custom Metric Data (to export data relating to a specific custom metric) or Export Data (for other metric types - using the generic export dialog) from the File menu

Exporting Custom Metric Data

The procedure is as follows:

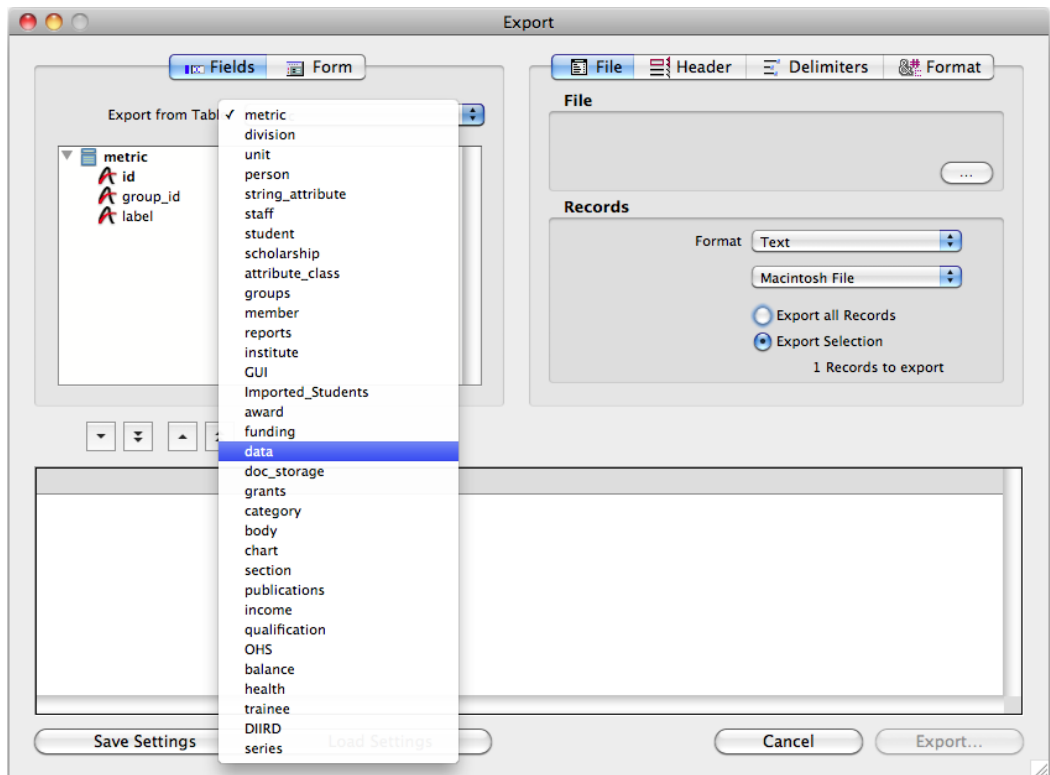
1. Select the custom metric you wish to export the data of from the filter picker.
2. You will now be presented with the standard export dialog

Figure 11.1. Standard Export Dialog - initial state



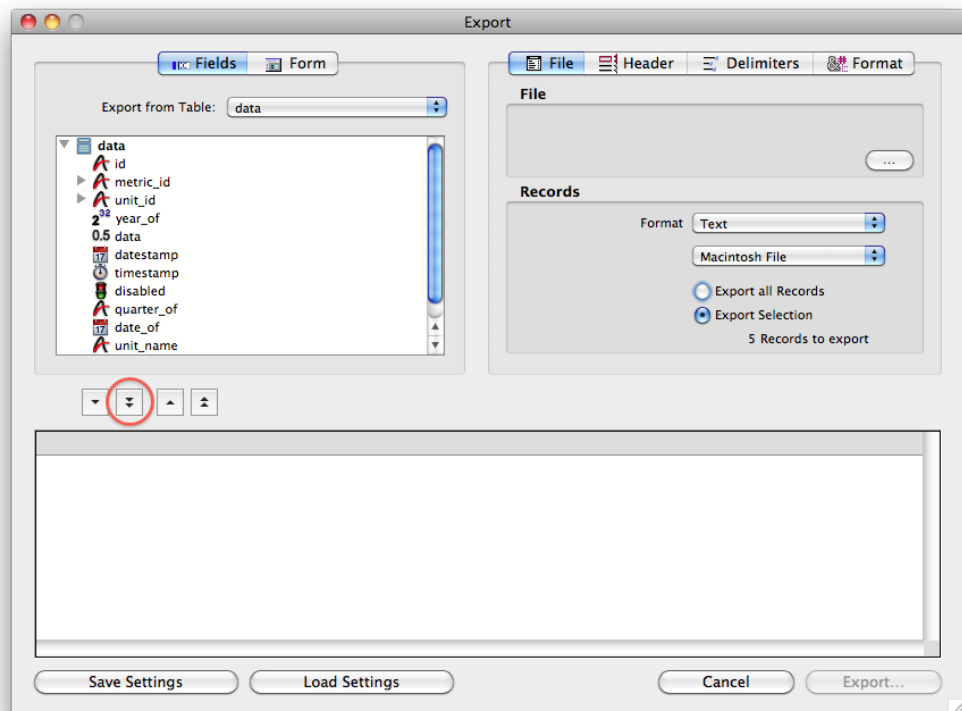
3. Click the Export from table popup and select the data table

Figure 11.2. Standard Export Dialog - changing the Export from table



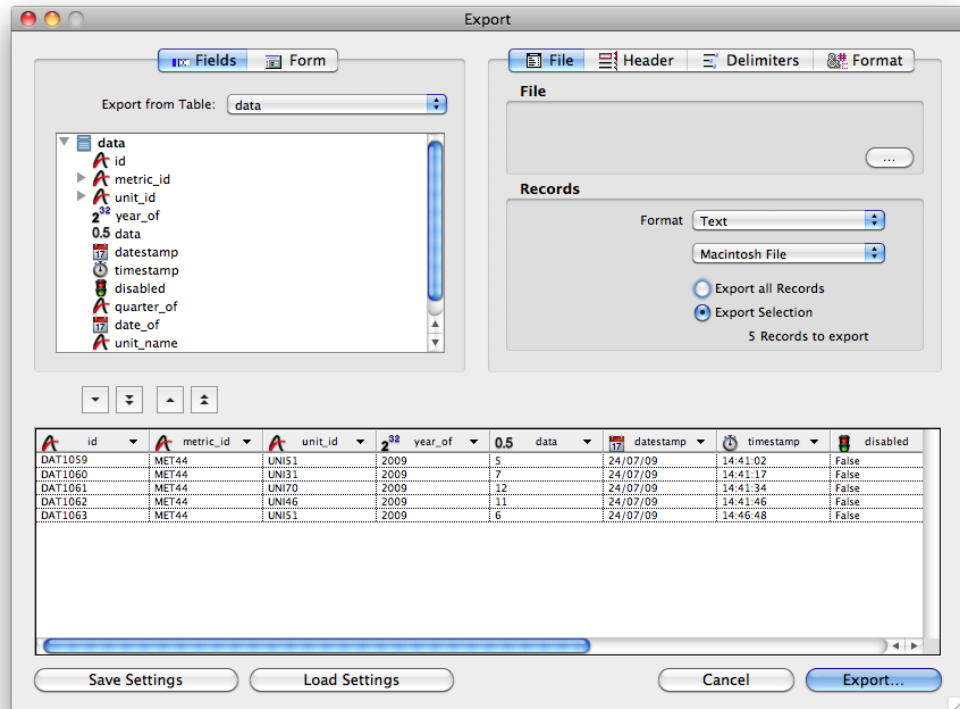
4. The list of available fields should update, as shown below:

Figure 11.3. Standard Export Dialog - fields from data table shown



- Click the Double down arrow button (circled in figure 11.3) to move all available fields in the data table to the export palette at the bottom of the window

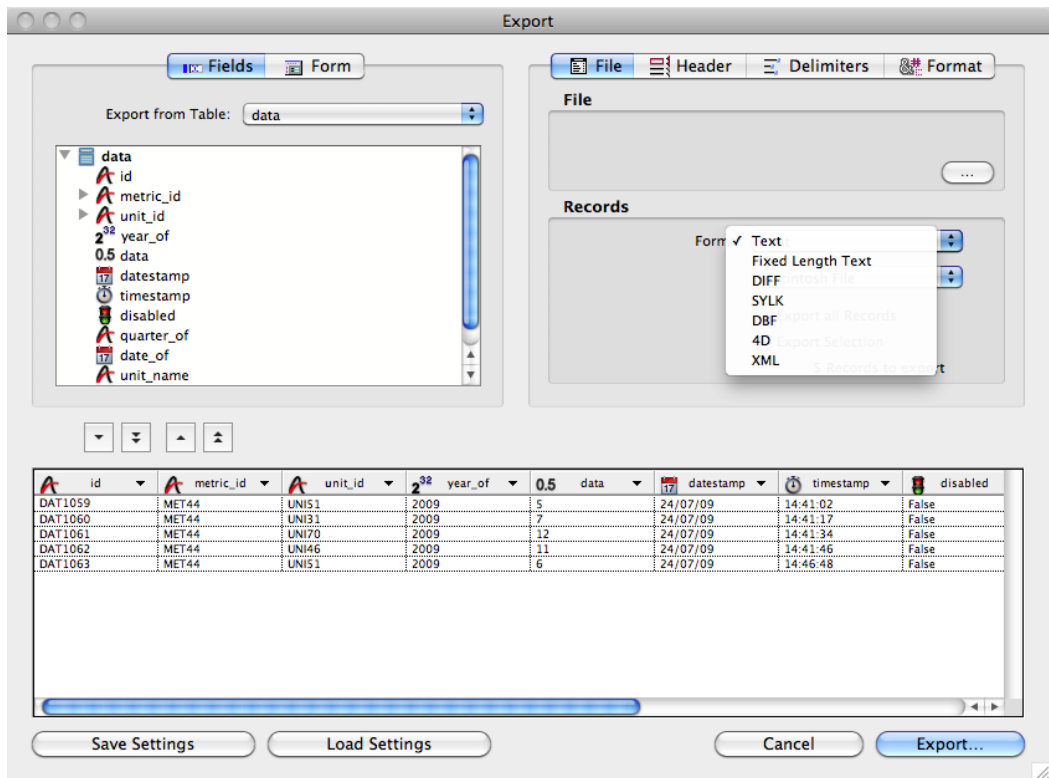
Figure 11.4. Standard Export Dialog - all fields being exported



Alternatively, select only those fields you wish to export

- If you wish, change the export file type using the Format popup menu on the right hand side

Figure 11.5. Standard Export Dialog - output format options



7. Click Export... and use the standard file dialog to select the location of the exported data file. The data will be exported when you click Save.

Exporting Data for other metric types

For further information about the generic data export system, please contact Halogenics.

Quick Reports

You can use Quick Report from the File menu to generate a custom report.

For further information about the Quick Report system, please contact Halogenics.

Chapter 12. Preferences & Settings

Preferences

People

A person record is used to record information about a person.

The person record also has the ability to act as a user record within the system.



How can I set it up so a person can login to the system?

To enable a person to login, the "Account is active" box must be checked on their record.

Adding a new Person

Contact Details tab

The contact details can be emails or phone numbers. This simply allows you to keep a list of ways in which a person may be contacted outside of the system.



Can I enter additional email addresses?

The primary email (located in the top part of the form) is the email address that will be used by the system for communication. While you can enter additional email addresses in the Contact Details tab, those additional addresses are for your reference only.

Group Memberships tab

There are two main types of Group memberships:

- System group memberships - membership of a System group will grant a person access to additional parts of the system. The next section explains more about the System groups and their intended role within Metrics.
- Custom group memberships - Custom group memberships allow you to create logical groupings of people.

Relationships tab

Relationships are used to represent how people are related to one another. eg: One person may be the supervisor of another, or the designated backup person should the primary person be unavailable. These relationships are for your reference only, and have no direct impact on the working of the system.

Group Roles tab

Similar to relationships, the Group Roles are used to record additional information about group members. Eg: Primary Contact for of the Finance group. Group Roles are for your reference only, and have no direct impact on the working of the system.

Groups

System groups

The default groups provided with Metrics are:

- Admin - these people can create and modify person records, and set basic system parameters, attributes and lists.
- Education - these people enter and maintain information regarding the students at the Institute.
- Finance - these people are responsible for entering data relating to the finances of the Institute
- Grants - these people enter and maintain information relating to grants and awards at the Institute
- OHS - these people enter information relating to OH&S data at the Institute
- Publications - these people enter and maintain information relating to Journal articles and other publications authored by staff at or affiliated with the Institute



Do not delete the system groups!

These groups perform specific functions within the system and should not be deleted. Deleting these groups could result in the loss of access to certain parts of the system.

Custom Groups

You can also add custom groups to the system. Other than logically grouping people for your own benefit or amusement, the most obvious practical use of this would be to create a group of people who require access to a specific metric or chart but who may not be in the same organisational or system group.

Data Access Control

Membership of these groups will determine which tabs a person will see when they log in to the database, and thus what data they are able to access and edit. For example, unless you're a member of the Finance group, you will not see the Finance tab when you login to the database. This means you cannot add, change or view the finance data in the system. In addition to this, Custom Metrics, Sections and Charts have a popup menu, which can be used to enable access control for that metric, section or chart. If a group is selected from this popup menu, then only a member of the specified group will be able to save changes to that record.

Custom metric data also has a disabled switch, which allows you to enter data into the system but disable it, meaning it will not be included in the summary metric Chart(s).

Chart Access Control & Appearance

Disabling Sections, Charts and Metrics

In addition to controlling who has access to the data, any section in the system may be "disabled" from the backend – meaning it will not appear in the dashboard. You can also disable a Chart, meaning it will not appear within the section to which it is assigned. Each section and each Chart has a sort order field. When the sections are created, they are sorted based on this field. This gives you an easy way to determine what order the sections, and the Charts within them, appear.

Attribute Classes

The attributes classes are a set of pre-defined lists which are used throughout the system. When you install Metrics, a number of these classes and the associated attributes are created for you. We understand that different institutions have differing nomenclature and naming conventions for various aspects of their operations. To help Metrics better fit your operational model, in many cases you can customise the values in these lists so the names and labels you see within the system match those commonly used within your organisation.

Chapter 13. Help & Support

Built in Help

The built in Metrics Help system is a web portal with a collection of predefined useful links, starting with a link to the support section of the Halogenics web site.

Halogenics Website and online training

The general support section of the Halogenics website is at: <http://www.halogenics.com/support/>

A number of “how to” movies and PDFs are available from the Halogenics website. Go to <http://www.halogenics.com/support/metrics> for specific support information regarding Metrics.

Halogenics Support Portal

The Halogenics Support Portal is an online resource for bug reporting and feature requests. You can browse current and past bugs and feature requests, or get an RSS feed of the latest issues. You also have the option of registering in the portal. Once registered, you are able to submit bug reports and feature requests and track their progress. You can elect to receive automatic emails as the job progresses.

Reporting a Bug

If you believe you've found a bug or problem in Metrics please let us know! We're constantly working to improve the product and are more than happy to investigate any issues you may have.

To report a bug please go to <http://support.halogenics.com> and submit a feature request.

Feature Requests

If there's a feature or capability you'd like to see added to the product, please go to <http://support.halogenics.com> and add a feature request.

Online Support

Halogenics utilises the ConnectNow technology from Adobe to remotely assist you with your Metrics installation. If you have a problem that cannot be solved, contact Halogenics and arrange a remote assistance session.

Our tech support team member will direct you to <http://connectnow.acrobat.com/halogenics>, where you will be able to login as a guest (there is no need to register - though it's free so you can if you like). Once logged in, you'll be directed to a virtual meeting room. You can then chat to the support team member, and have the option of sharing your screen so the support staff can see exactly what you're seeing.



ConnectNow System Requirements

ConnectNow requires a web browser and the Flash Plugin.

The plugin is free and can be downloaded from Adobe

To share your screen, a free additional plugin is required - this will occur automatically if you attempt to share your screen.

Please see <http://www.halogenics.com/support/> for more information.

System Requirements

Please see <http://www.halogenics.com/support/> for the latest system requirements.

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