User Instructions for STATT Database

Introduction – Quick Start

Getting to Your Data Fast

Just want to find the data, download it, and get on with your day? Good news — the new platform looks a little different, but the steps are simple.

1. Go Straight to the Data

- From the top menu, choose **Reporting → Quick Reports**.
- Pick one of these:
    - **STATT: QuickSearch All Columns** – the full dataset.
    - **STATT: QuickSearch Big 6 (U.S. or Canada)** – the most-used metrics.
- Choose your year or years, click **Run Report**, and export to **CSV or Excel**.

2. Build Your Own Report

If you want to compare different years or groups:

- Go to **Reporting → Data Explorer**.
- Select your **comparison group** (like "U.S. All Institutions").
- Pick your **years** and **variables** (the questions or data points you want).
- Click **View Results** to see the data, then **Export** if you want a file.

3. Save It for Next Time

Once you have a setup you like:

- Click **Save as Slide** to save your report view.
- Combine multiple slides into a **Slide Show** so you can re-run them anytime with updated data.

4. More Help

- Some reports open in a new tab — allow pop-ups so you don't miss them.
- Use the built-in **Help** icon in the **PeerFocus** menu for quick tutorials and FAQs.
- Visit **autm.net/statt** for video walkthroughs, FAQs, and contact info if you need assistance.

- If you can't find what you're looking for, email surveys@autm.net — the AUTM team can point you in the right direction.

Quick How-Tos

Short Guides

These short guides walk you through common tasks — like finding your data, running reports, and sharing results — in just a few steps.

1. **Compare Your Institution to Peers**
   See how your office stacks up against similar institutions.

   Steps
- Go to **Reporting → Data Explorer**.
- Pick the **comparison group** you want (for example, *U.S. Institutions*).
- Choose your **years** and **variables** (like licenses, patents, or revenue).
- Click **View Results**, then export if needed.

Pro Tip: You can also create your own comparison list under **Reporting → Comparison Groups.**

2. **Track Trends Over Time**
   View how your activity has changed across multiple years.

   Steps
- Open **Data Explorer**.
- Select your institution and the **years** you want to compare.
- Choose variables such as *Invention Disclosures* or *Licenses Executed.*
- Click **View Results** to see your trend, or export for charts.

Pro Tip: Save this setup as a **Slide** so you can rerun it each year.

3. **Find the Most-Used Data Fast**
   Grab the key "Big 6" metrics or full data table quickly.

   Steps
- Go to **Reporting → Quick Reports.**
- Select **STATT: QuickSearch Big 6** (U.S. or Canada) or **STATT: All Columns.**
- Pick the year(s) and export to Excel.

Pro Tip: These reports replicate the old *QuickSearch* tool you already know.

4. **Build a Custom Report for Leadership**
   Create a tailored snapshot (for a presentation or board report).

   Steps

- In **Data Explorer**, choose the data points your leadership wants (revenues, startups, IP filings, etc.).
- Add your comparison group and years.
- Click **Save as Slide**, then combine multiple slides into a **Slide Show.**

Pro Tip: Each time you rerun it, data automatically updates — no need to rebuild the report.

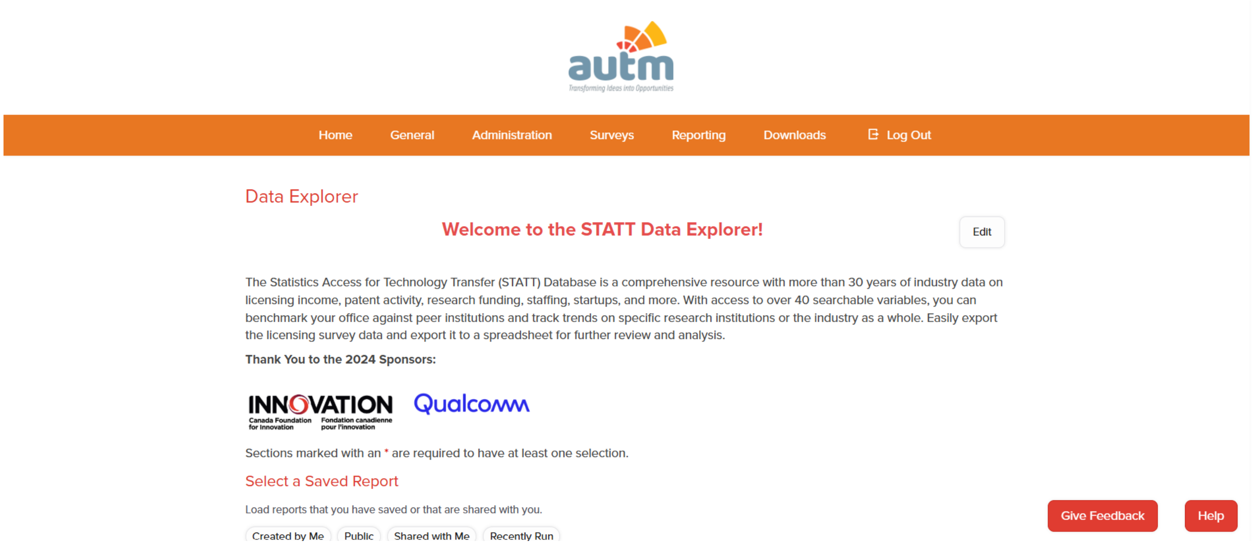
Data Explorer

What is the Data Explorer?

Data Explorer is where you will find advanced access to the STATT data. Use this tool to select years, comparison groups, and specific variables for your analysis, use filters to refine your search, and then view or download your results.

The new version of STATT is a Data Explorer that allows you to choose multiple comparison groups, variables, years, and more to create your own exportable report. The Data Explorer gives you the ability to build and save these report configurations as **Slides** that can then be used in **Slide Show** reports that you can build with various Data Explorer slides and text and image slides. Reports you build within the Data Explorer can be shared to other users at your organization to make it easy for multiple people to access the same customized reports.

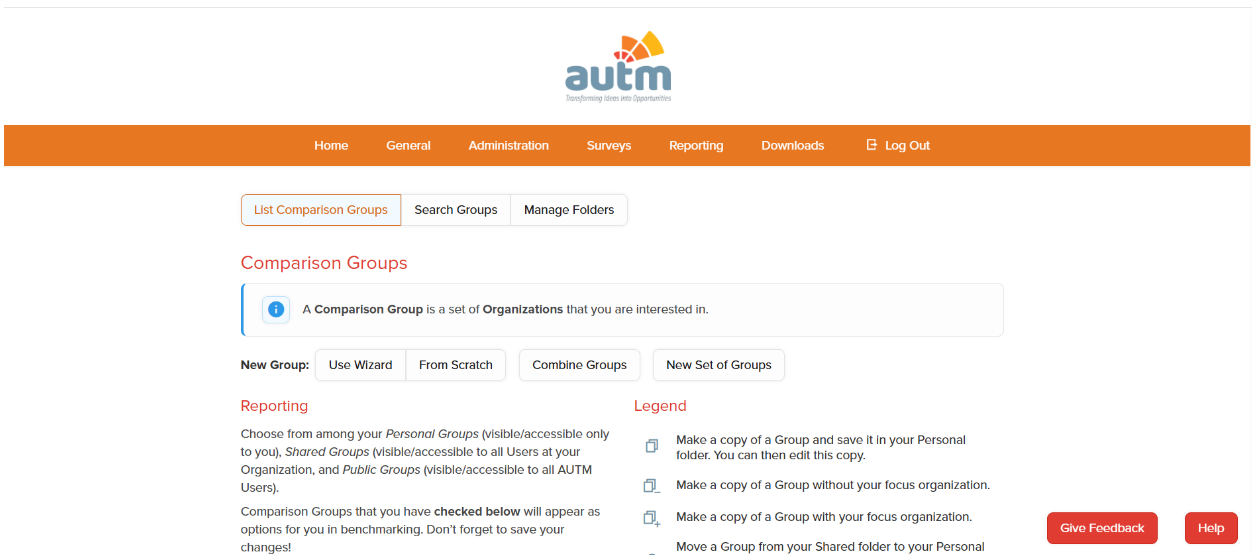
The historical STATT data has been imported into the current system and newly collected data will flow directly into the reporting after review each year.



New Features with the STATT Data Explorer

Comparison Groups Based on Location or Other Criteria

You now have the option to use all of the STATT data regardless of organization location, to use the predefined location-based comparison groups, or to create your own custom comparison groups of organizations for each of your reports. To find the US Only or Canada Only data, you can use the AUTM-provided comparison groups for STATT.



Optional Currency Conversion

When users submit their data, they are asked to provide the currency in which the data are being reported. You now have the option to view the data in the originally reported currency or to convert the data based on an automated currency conversion. The annual date used for the conversion is July 1. If you would like to convert the currency as of a different date, you can export your data set with the currency reported to a csv and then use any spreadsheet or analysis tool to convert the data as desired.

How do I Customize my STATT Data Explorer Reports?

Select a Saved Report

If you have already created and saved a Data Explorer report, you can begin typing the name here to select the existing report. If this is your first time using this tool or if you are starting a new search, you can leave this blank.

Comparison Groups

A comparison group is a selected set of organizations whose data is used to benchmark against other organizations. You can use predefined comparison groups specifically created for STATT or use your own. If you begin typing, the names of the matching available comparison groups will display. To see all of the Comparison Groups currently available to you or to create a new group, see Comparison Group page under the Reporting menu.

Predefined STATT Comparison Groups Available to Use

STATT: Canada - Across All Years
STATT: US - Across All Years

Organizations

If you would like to add individual organizations to your report, use the search bar to find and select organizations to be included. This is in addition to the Comparison Group selection. If you do not need to add any additional organizations to your set, you can leave this blank.

Years

These are the years of data in the database. You can select one or more years to include in your output. You must select at least one year here.

Variables

A variable represents the data collected from a specific survey question or form field. Start by selecting a variable family, which groups related questions by topic. Then, choose a variable within that family to focus on a particular question for benchmarking. You can select multiple variables at a time.

Filters

You can filter the data for each of your variables once it has been selected by clicking on the filter icon next to the variable. Any filters selected here will be in place on the output, but you will also have the opportunity to adjust each filter from the output page to dynamically adjust your view.

Currency Conversion (Optional)

As you have the option to combine organizations from different locations into Comparison Groups for reporting, we have also included an option for you to convert the currencies for comparison if you would like to do so. Leaving this set at "Select a Currency" will leave all of the reported amounts in their originally reported currency. If you select a specific currency, the currency amounts would be automatically converted based on a July 1 currency conversion rate. To display the label for the currency in which the data were originally reported as part of your report output, include the variable listed as "Currency in which data was reported [LSCURRENCY]" in your selected variables.

How Do I View the QuickSearch Big 6 and All Columns Data Reports?

These have been predesigned by AUTM and are available to you through the Reporting Menu. Select Quick Reports from the menu and then select from the available STATT QuickSearch Predesigned reports. These reports are preconfigured by AUTM to include the specific years and data points previously available through the QuickSearch tool.

Comparison Groups

Knowledge Base: What are Comparison Groups?

What are Comparison Groups?

Comparison Groups are saved lists of organizations that you can use as comparison sets to view data for reporting. You can view existing lists and create new ones through the Reporting menu under Comparison Groups.

The Comparison Group tools allow approved accounts to access custom lists of selected Organizations and use those special sets to pull data through predefined reports or other reporting tools. Depending on the account roles assigned, you may be able to use existing comparison groups, create your own, or share comparison groups with other users at your organization.

Selecting which organizations to use in your comparison groups is commonly based on organization characteristics like location, participation in specific surveys or years of data, organization classifications on file, or other useful factors. Users who can create comparison groups can click the "Use Wizard" option to search for organizations meeting specific criteria or the "From Scratch" option to select by searching for organizations by name.

Types of Comparison Groups

Each comparison group is organized within your comparison group list by type. When you save a comparison group, it is initially listed as a **Personal** group. If you want other people at your organization to be able to use that group, you can designate it as **Shared**. If the site administrator creates and shares a comparison group to all users, it will be listed as **Public.**

- **Personal:** Created by and visible/accessible only to you. This group can only be used by the account that created it.
- **Shared:** Created by you and visible/accessible to all Users at your Organization. This group can be seen and used by any other user account belonging to the creating account’s organization.
- **Public:** Created by a platform administrator and shared to all users at all organizations. This group is available to all users.

Special Restrictions and Protections on Comparison Groups

Please review the instructions on the Reporting Comparison Groups page to learn more about any special restrictions or notes about comparison group creation. The most commonly seen restrictions are listed below for reference.

- **Minimum Size and Difference Requirements:** On the Comparison Group page, you will find details about the minimums required to save a comparison group. These requirements often include a minimum number of organizations, minimum difference in organizations from existing comparison groups you have access to use, and minimum differences based on specific organization characteristics to help maintain data confidentiality.

Knowledge Base: How to Create and Manage Comparison Groups

How to Create and Manage Comparison Groups?

The Comparison Groups tab is where you edit and manage your comparison groups for reporting. There's multiple ways to create or use a comparison group:

Creating a new comparison group

1. **Use the Wizard:** Use filters to search for specific organizations based on characteristics such as location, survey participation, survey variables, and other classifications.
2. **Create from Scratch:** Search for organizations by name and create your list.

Note: All comparison groups must meet specific minimum requirements for confidentiality purposes, so please review the information on limitations listed on your comparison group page.

Viewing existing comparison group from other users

1. **Review Shared Groups:** View comparison groups created by other users at your organization that are shared with you.
2. **Review Public Groups:** View comparison groups shared by site administrators. These are available for use by all users.

Managing your comparison groups

1. **Select which comparison groups should appear in your reporting options:** You can determine which comparison groups appear as options in your reporting dropdowns by setting the hide or display checkboxes when you look at your comparison group lists.
2. **Share a comparison group with other users at your organization:** You can share a comparison group by clicking the down arrow icon on any **Personal** group. Once the comparison group has been shared, any assigned users at your organization will be able to use that group.
3. **Making a copy of an existing comparison group:** You can create a copy of any existing comparison group in **Personal, Shared, or Public** folders by clicking on the copy icon. Copied groups will be subject to all standard restrictions and limitations and will appear in your **Personal** group List.
4. **Deleting a comparison group:** You can delete any Personal comparison group by clicking on the delete icon. Please note that deleted groups are kept in cache and are still automatically reviewed as part of any confidentiality or other restrictions in place.

STATT Specific Instructions for Comparison Groups

Creating and Sharing Comparison Groups

- If you would like to limit your data set for your reports to specific organizations by name, location, institution type, or other available characteristics, you can create custom comparison groups. Once these groups have been created and saved, you can use them with any report or benchmarking tools available to you and can share the comparison groups with others at your organization easily to coordinate your efforts.
  - AUTM has created an initial set of public comparison groups based on STATT participation and made these available for your use.
  - If you would like to create custom comparison groups based on location, years of survey participation, institution type, or other classifications, you can use the Comparison Group wizard to help you design and save your group.
  - Saved groups can be kept in your Personal Groups or can be shared to the other users at your institution which would then display under Shared Groups.
  - You can determine which comparison groups appear as options in your report dropdowns by setting the hide or display checkboxes when you look at your Comparison Group lists.
  - All comparison groups must meet specific minimum requirements for confidentiality purposes, so please review the information on limitations listed on your comparison group page.

Using Comparison Groups for Viewing Report Results

Comparison Groups

Comparison groups are selected sets of institutions to include when you run a slide show, data explorer, or other selectable data report. AUTM provides a set of basic comparison groups that are available to all users with access to the benchmarking reports. In addition to these groupings, end users can create their own comparison groups to use with the reports. Regardless of which institutions are chosen to be in a comparison group, the standard confidentiality restrictions built into both the group creation and report tools ensure that only the approved data can be seen.

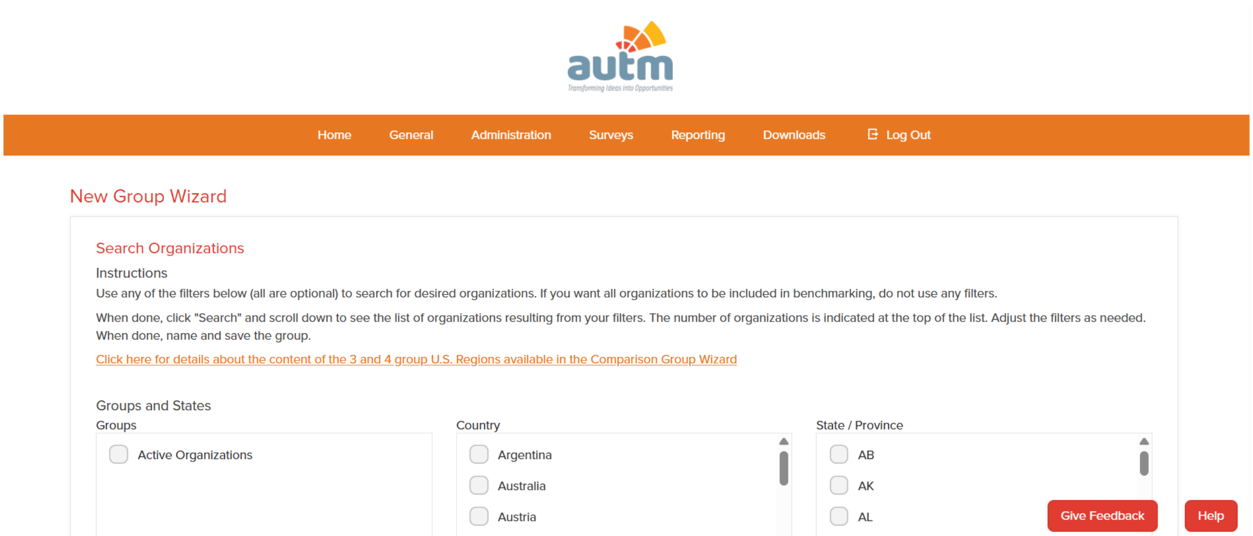
Comparison groups can be Personal (only available in that user's account), Shared (available to all approved user accounts at their institution, and Public (created and shared by AUTM). All comparison groups that are available to be used or created by end users must meet specific minimum requirements to protect confidentiality.

Comparison Group Restrictions

- Each group must have a minimum of 7 institutions.
- Each group must differ by at least 3 institutions from all other comparison groups in the user's account.
- Restrictions apply even if the previously used group has been deleted as comparison groups deleted by end users are soft-deleted and held in cache for confidentiality comparisons.

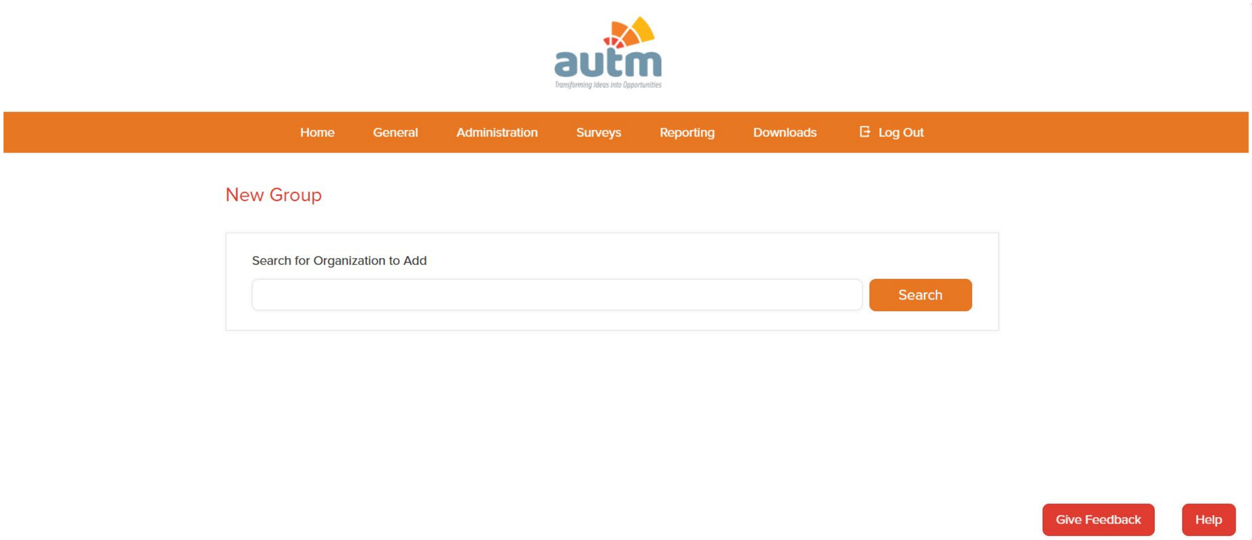
Comparison Group Wizard

Using this tool, end users with access to create comparison groups can choose to customize their group by including filters in their search such as location, participation in specific surveys and years, or other institution profile information like institution type. Users can adjust their search and further customize the results list before saving the group. If a comparison group does not meet the minimum requirements for creation or use, the user will be unable to save that comparison group.



Comparison Group From Scratch

Using this tool, end users with access to create comparison groups can search for individual institutions one at a time to add to a list. Once the full list has been added, the user would then save the comparison group. If a comparison group does not meet the minimum requirements for creation or use, the user will be unable to save that comparison group.



Reporting

Where do I find data and reports for benchmarking?

In the menu, choose **Reporting** to access the available data and reports. Under this menu, you will see an overview of the reports and tools assigned to your account. Click on the **Overview of Tools** to see a brief description of each. The most commonly available options on this menu will be **Comparison Groups**, **Quick Reports**, **Slide Shows**, **Data Explorer**, and **Variable Index**.

- **Comparison Groups** allows you to view and create lists of institutions to use in your data analyses. AUTM may have already created some public comparison groups for your convenience.
- **Quick Reports** allow you to run specific predefined reports and slide shows. These are already pre-built so that you only need to select some basic parameters to run the reports or slide shows to view the data.
- **Slide Shows** are saved report configurations built through benchmarking tools like the **Data Explorer**. You can save your Data Explorer outputs as slides and build your own slide shows based on your selected data views. You may also have access to some pre-built Slide Shows created by AUTM through the Quick Reports page.
- **Data Explorer** is where you will find the advanced access to the STATT data. Use this tool to select years, comparison groups, and specific variables for your analysis, use filters to refine your search, and then view or download your results.
- **Variable Index** gives you access to additional information about each of the variables. This may include information about the source of the data collected, when the variable first or last appears in the data, or other reference information.

Quick Reports

What are Quick Reports?

Quick Reports are predefined reports that have been designed by AUTM for use with specific sets of data. If you are not currently assigned any of the existing Quick Reports, you may not see any items listed under the All Reports menu.

Quick Reports include both predefined custom reports and pre-built **Slide Shows** based on **Data Explorer** selections designed by AUTM.

Current Quick Reports & Slide Shows (October 2025)

[Availability based on access assigned by AUTM]

Salary Survey Quick Reports

Single Position Report
Multi Position Report

STATT QuickSearch Predesigned Report Slide Shows

STATT: QuickSearch All Data Columns
STATT: QuickSearch Big 6 (Canada Only)
STATT: QuickSearch Big 6 (US Only)

Using a Predefined Quick Report or Slide Show Report

First, click on the name of the report that you would like to run. This will bring you to the parameters page where you can make any adjustments to your selections before viewing the data. Each report will be used with one or more **comparison groups**. The selectable options will differ based on the report you've chosen. The most common types of selectable parameters are listed below.

Common Report Parameter Options

- **Comparison Group(s):** Choose from your existing comparison groups to limit the report results to the institutions from that list.
- **Year**: Choose which year(s) of data to include.
- **Comparison/calculation options:** Select things like currency, specific percentiles, and other calculation customization options.
- **Data filters:** Filter based on specific data points from the reported data.
- **Variable selections:** Data Explorer reports include the ability to select specific variables or topics to include in your results.

Slide Shows

What are Slide Shows?

Slideshows are reports results that can be ran again without reselecting report parameters each time—these reports are dynamic and automatically update with the latest available data whenever you run them.

When viewing Data Explorer report results, you have the option to "Save as Slide" to capture your current report output and parameters and save for future use. Slideshows can be saved for personal use or shared with other users at your organization.

To view your saved Slide Shows, navigate to Reporting > Slide Shows.