Activity Insight:

Administrator's Guide

Welcome to Activity Insight!

Activity Insight is our implementation of Watermark's Digital Measures, a fully customizable online information management system designed to organize and report on your faculty's research/creative activities, teaching, and service accomplishments. It provides the most reliable, versatile, and secure solution for generating custom reports easily and in real time.

Benefits to Users

Activity Insight lessens the burden of periodic reviewing and reporting of faculty by academic administrators (e.g., department chairs, center directors and deans). Instead of having to run/create each faculty's report separately as a reviewer, Activity Insight gives you the ability to run a single report for all faculty in your department, center, or school/college. Additionally, Proxy users are able to "login" as faculty and manage and/or review data in Activity Insight. The web-based interface is easy to use and intuitive.

Logging In to Activity Insight

To log in to Activity Insight, navigate to the Activity Insight portal, faculty.umd.edu/data and use the Log In button. You'll use CAS to authenticate.

Proxy users need to have the faculty member authorize the proxy access. This can be accomplished using the online authorization form. If you encounter any issues while filling out the online form, you can alternatively complete this Word version of the form. Sign the form, scan it and send the scan file to *ai-help@umd.edu*.

Activity Insight Overview

The Activities screen will be your home screen. From this screen you can choose any of the blue links to enter or edit your own activities, if you are a faculty user.

As a proxy user, the home screen looks different. It is the Manage Data screen which you will use to manage another faculty member's activities.

Administrators have two "home screens" available through the Activities menu item in the top navigation bar: Manage Activities and Manage Data.
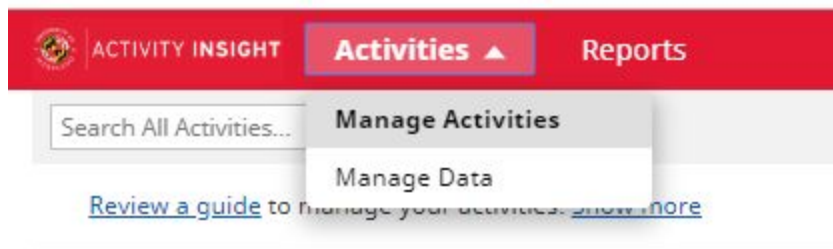
Manage Activities gives you access to the main Activities screen, where you can maintain your personal activity data. Manage Data gives you access to other faculty member's activities within your viewing scope.

Important Note: The utilities and functionally that are displayed here will depend on whether you a Faculty Admin or non-faculty Proxy User in Activity Insight. If you are both a faculty and admin (e.g. chair, director or dean) you will have more options than a proxy user (e.g. administrative support).

Reports can be generated through the Reports button in the top navigation bar, or from the Rapid Reports button available on every screen. Note that Rapid Reports has fewer filter/configuration settings; use the Reports button to get full functionality.
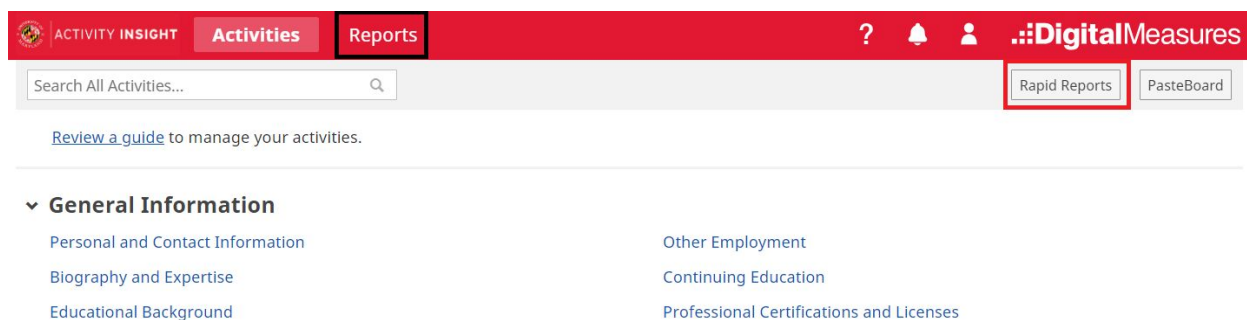
Proxy users will not have access to any reports.

Integrated Systems: Data Automatically Loaded for You

Some screens' activity data is populated through integrations with other campus systems - PHR, SIS, CourseEvalUM and Kuali Research. The table below provides details on the screens that are populated through the

integrations, the frequency of the updates, and the data coverage.

Data populated from campus integrations cannot be edited on the data screen. Check below to see how to get changes made, if needed:

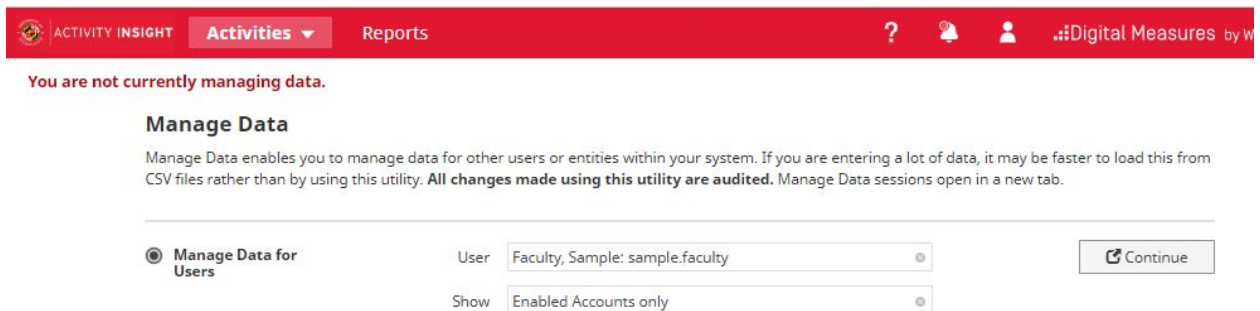| Activity Screen Name	Campus System	Data Update Schedule	Data Coverage	Contact Information for Updates/Changes
Personal and Contact Information; Tenure and Rank; Appointments at UMD	PHR	Bi-weekly on Mondays	2010 - present	If changes are needed contact your unit's PHR coordinator.
Scheduled Teaching	SIS	Five weeks after each term ends	2010 academic year - present	If you want to have a change made in the scheduling system, please contact your scheduling officer.
Course Evaluations	Course EvalUM	Five weeks after the term ends	2014 academic year - present	If you have questions about the data on this screen, contact the CourseEvalUM Help Center.
ORA Managed Awards; ORA Managed Proposals; Active ORA-Managed Awards	Kuali Research	Late January each year, with the previous calendar year's data	2010 - present	Requests for corrections to Kuali Research for any active projects can be made through your department's business administrator.
Participation in Thesis/Dissertation Committees	Graduate School Student Advising	Five weeks after the term ends	2018-2019 academic year	Activity Insight Team (ai-help@umd.edu)

Manage Data

The Manage Data screen is the default home page for a non-faculty proxy users. It is also available to administrative users at the departmental or college level through the Activities menu item in the top navigation bar. This utility allows the user to review Activity Insight data as a faculty member (i.e. view data as the faculty). Proxy access users will also be able to edit faculty data. Chairs, directors and deans can view faculty data but not manage/edit it.

To manage/view data for a faculty:

1. Click on the **Activities** link in the top navigation menu, and **Manage Data** if a submenu is presented.
2. Select the faculty from the **User Dropdown** List.

Click on the **Continue** button.

Once you are actively managing data for the faculty member, a new browser window will open and the navigation menu will appear slightly different – based on how it appears for the faculty. **There is also a subtle notification (bolded) near the top of the screen to let you know for which faculty you are managing data**

To *stop* managing data for a user, simply close the active window. This should return you back to the main Manage Data screen.

Reports

Built-in Reports

The Reports component allows users to run a variety of built-in reports or create custom reports. This guide and its screenshots will reference the most commonly used report - **Annual Activity Report**.

There are several different reporting options that can be specified for a report in **Reports**:

Report Type: the first screen shown after clicking on *Reports* will list all the available reports in Activity Insight. Select the type of report you wish to run from this page. Once selected, the next screen will display the reporting options for the selected report.

Reports

+ Create a New Report

Select the report you would like to view or edit, or select to create a new report.

Name ▲	Created By	Actions
Academic Degrees Earned	Digital Measures	🔒
Annual Activity Report	Digital Measures	🔒
Awards and Honors	Digital Measures	🔒
Birthday Report by Month	Digital Measures	🔒
Contracts, Grants and Sponsored Research by Faculty	Digital Measures	🔒
Creative Scholarship by Faculty	Digital Measures	🔒
Editorial and Review Activities by Faculty	Digital Measures	🔒
External and Community Service by Faculty	Digital Measures	🔒
Faculty/Staff Directory	Digital Measures	🔒
NIH Biographical Sketch	Digital Measures	🔒
NSF Biographical Sketch	Digital Measures	🔒
Presentations by Faculty	Digital Measures	🔒
Publications by Faculty	Digital Measures	🔒
Scheduled Teaching by Faculty	Digital Measures	🔒
Summary Activity Report	Digital Measures	🔒
UMD Vita	Digital Measures	🔒

1) Date Range: specify a Start Date and End Date for the report to retrieve results within certain time periods (e.g. one year, multiple years, x amount of months). The default date range for most reports is the current calendar year; for the UMD Vita it is from 1925 to present.

2) Whom to Include: by default, all faculty members within your department/school (based on your security role) will be included on the report output. This option allows you to run a report for select faculty members (individuals only), or for the entire department, school/college, or campus (dependent on your role). To select certain individuals, or an entire group, click on the Change Selection link in option 2.

3) Individuals or groups to include:Change Selection opens a popup window and gives access to five different means of selecting faculty to include in the report:

a. **Assigned Base County** - This filter is to be used for University of Maryland Extension faculty only based on county assignment.

b. **Cluster or State Assignment** - This filter is to be used for University of Maryland Extension faculty only based on geographic and/or program assignment.

c. **College** - all faculty with a current appointment in the selected college. The list of colleges in this category covers the set of colleges in which faculty in your scope have appointments.

d. **Department-** all faculty with a current appointment in the selected department or center. The list of departments in this

category covers the set of departments in which faculty in your scope have appointments.

e. **Individual** - individually identified faculty; all faculty in scope of the administrative user are listed.

f. **OPA** - all users participating in Outside Professional Activities reporting.

g. **Program or Administrative Assignment** - This filter is to be used for University of Maryland Extension faculty only based on program or administrative assignment.

h. **TTK** - all tenure/tenure-track faculty.

i. **Tenure Home College** - all faculty with their tenure home in the selected college.

j. **Tenure Home Department** - all faculty with their tenure home in the selected department.

Use the right-facing caret to expand the particular category and select options within it. Selections can be made in more than one category and to include more than one option within a particular category.

4) To select those faculty who are tenured in your college or department/center, open the **Tenure Home College** or **Tenure Home Department** category and select your college or department/center from the set of possible options.

5) Click on the Save button to finish.

6) File Format: choose your output file format (MS Word, PDF, or Web page) and page size (Letter, A4) under this reporting option.

7) Select **Run Report** to generate the report.

Custom Reports

Create a New Report – From the main Reports screen, there is an option to *Create a New Report* at the top-right of the report selection screen.
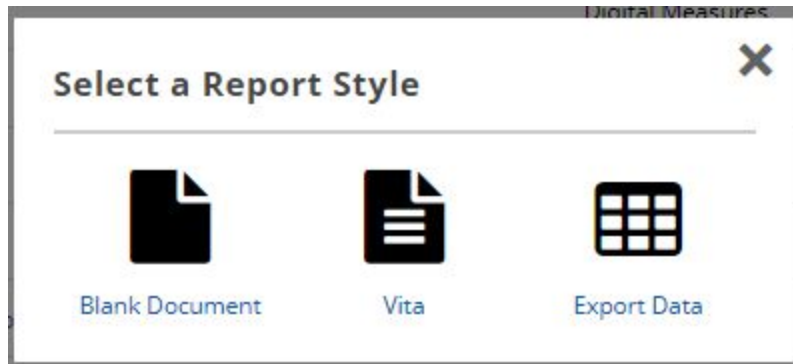

This provides three report style choices.

Blank Document and **Vita** provide a self-service tool for configuring your own report or CV. The **Vita** option starts the report/CV creation process from a general all-purpose CV format provided by Digital Measures. It is distinct from the UMD Vita report template. The **Blank Document** lets you build a CV from scratch. Further details on both of these self-service reporting tools can be found on at Digital Measures.

The **Export Data** style lets you set up a new report that:

1) Includes only certain users - *Option 2: Whom to Include*
2) Includes only certain data/fields - *Option 3: Data to Include.* Select from one or more activity screens for inclusion in the report. The default is to include data from all screens.
3) Groups the output by department/center, college, tenure home (college or department) or individual - *Option 4: Grouping Method*
4) Yields data for any field that contains a keyword, or a string of keywords with Boolean operators (click on the question mark icon to view the Help document for keyword search) - *Option 5: Search Keywords.*
5) Specify the report output; by default the output is CSV. You can change to XML – *Option 6: File Format*. Additionally, you can specify if the generated report has a single file per screen, or multiple. Most often, the default CSV and Single file options are used.

Most frequently, you will want to modify the default for option 3, Data to Include. To make changes use Change Selection to get access to the entire set of screen names.

On the Data to Include popup, uncheck 'Include All' and then open the Common Items section.

Select the screen name for the data export and Save.

Once finished setting up the reporting options, click on the Run Report to create the file. Note that the column headings are described in the [Activity Insight Configuration Report](#) spreadsheet. Navigate to the particular activity screen's tab in the configuration report file, and cross reference the column heading's code with the associated label seen on the data screen in the platform.

Special Reporting Situations

When faculty leave the institution, their accounts are disabled but their data remains in place in the system. If you find that you need to include faculty in a report after they have left, you will need to add them to your **Whom to**

Include selection, and change the setting of the **Include These Accounts** option:

1. After selecting the group of faculty you need included in your report (e.g., by Department, College or Tenure Home Department), use the Individual selector to add those faculty who have left the institution but need to be included in the report.
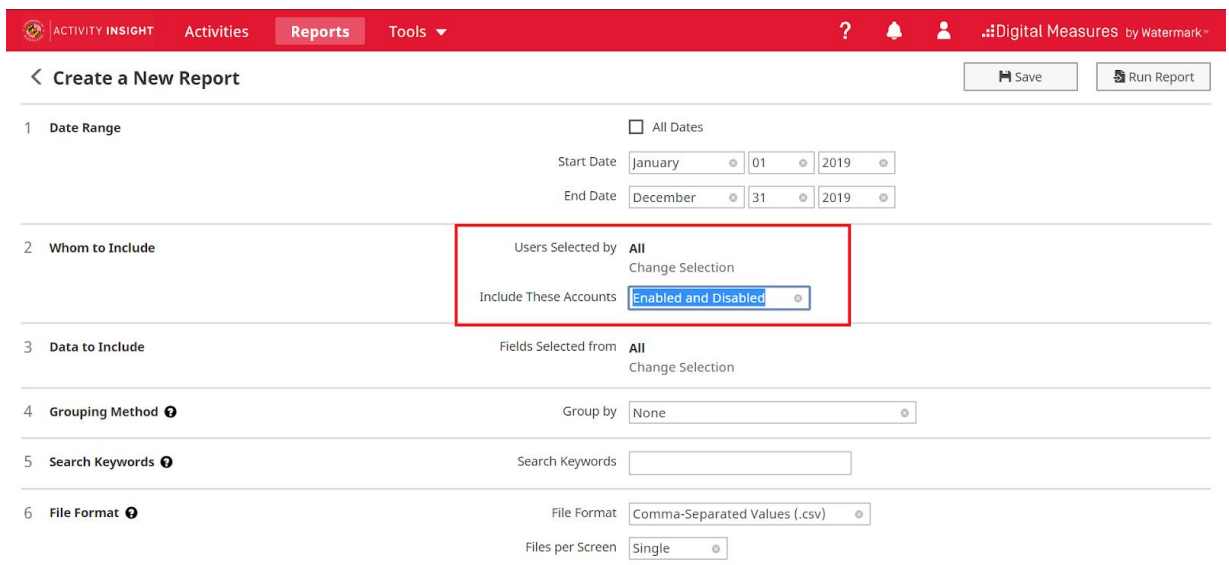

2. After saving this selection, choose "Enabled and Disabled Accounts" for the **Include These Accounts** option.

3. Run your report.

Guide to the Configuration Report

The [Configuration Report](#) is a reference for how the Activity Insight data is currently configured. This is a system-generated Microsoft Excel workbook showing the structure of the Activity Insight instrument, with the details of the input fields for each screen on a separate worksheet.

The [Configuration Report](#) provides the following information:

On the "Overview" tab...
- **Screen codes**.
- **Summary Display logic**. This refers to the information that displays on the summary screen, or the list of existing records for a given screen.
- **Screen access settings**.
- **Force editable**. For screens with access restrictions, are users allowed to create new records?
- **Date required**. This tells you whether users must enter a significant date before saving the record.
- **Primary Key**. This is a group of fields that can be used to identify unique records and prevent the creation of duplicates when importing data.

On the screen-specific tabs...
- **Data Field Label** - what is seen on the data screen in Activity Insight
- **Field codes** - the internal code for that data field; this appears in column headings in the ad-hoc CSV data export reports
- **Display** - Text, Numeric, Dropdown, Radio Button. For drop-down displays, pay attention to the Options - this is what the acceptable values are for this field.
- **Permission**
- **Access** - some data fields are hidden; others are read-only which is indicated with a Locked access
- **Required**?
- **Default value**.
- **Minimum/maximum values**.

- **Options**. This pertains to drop-down lists of checkbox lists with predefined options.
- **Other attributes**. This includes field-specific help text.