



UNIVERSITY OF  
MARYLAND

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THE OFFICE OF FACULTY AFFAIRS

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# 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 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

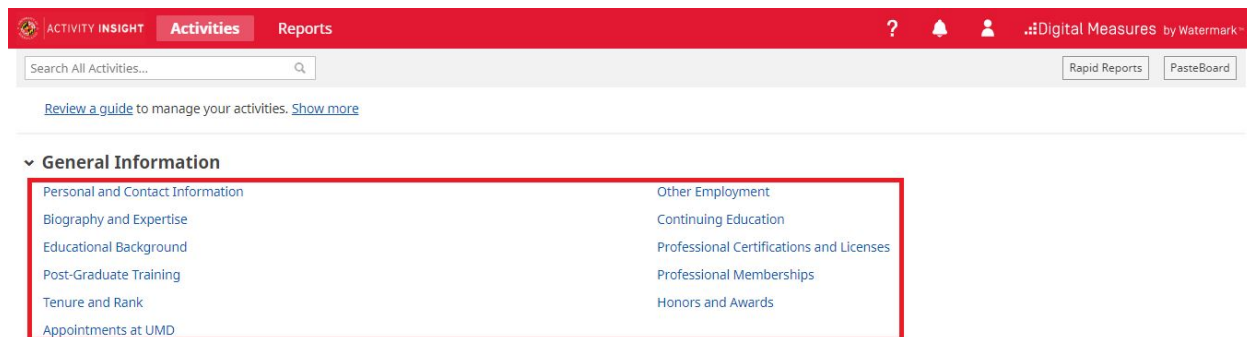
Activity Insight eliminates periodic, recurring requests for information on your activities and accomplishments. Faculty can also generate up-to-date CVs as well as annual reports. The web-based interface is easy to use and intuitive.

## Logging In to Activity Insight

To log in to Activity Insight, navigate to the Activity Insight portal, [faculty.umd.edu/data](http://faculty.umd.edu/data) and use the *Log In* button. You'll use CAS to authenticate.

## 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 activities.



Reports can also be generated through the Reports button in the top navigation bar, or from the Rapid Reports button available on every screen.



▼ **General Information**

Personal and Contact Information

Biography and Expertise

Educational Background

Other Employment

Continuing Education

Professional Certifications and Licenses

The ? icon in the top navigation bar opens a popup that sends email directly to the Activity Insight team at UMD.

The *Search All Activities...* input area is a quick way to locate activities on any screen based on free-text search terms.

The guide available for review on the Activities screen is provided by Digital Measures. Use the *Show more* link to access this UMD Faculty User Guide.



## Data Brought In From Other Sources

Activity Insight automatically brings in activity data from other sources, in particular other campus data management systems. The sections highlighted

below bring in such data so it does not have to be manually entered:

▼ **General Information**

Personal and Contact Information

Biography and Expertise

Educational Background

Post-Graduate Training

Tenure and Rank

Appointments at UMD

Other Employment

Continuing Education

Professional Certifications and Licenses

Professional Memberships

Honors and Awards

▼ **Teaching, Extension, Mentoring, and Advising**

Research Advising

Participation in Thesis/Dissertation Committees

Mentorship - Guiding Professional Development

Professional and Extension Education

Non-Credit Instruction

Scheduled Teaching

Course Evaluations

Curricular Advising

Teaching Innovation

▼ **Research, Scholarly, Creative and/or Professional Activities**

Biographical Sketch - NIH | NSF

Publications

Presentations

Significant Works in Public Media

Creative Scholarship

Reviews of Creative Research/Scholarship

Professional and Extension Publications

Patents and Inventions

Centers for Research and Creative Scholarship

▼ **Sponsored Research**

Active ORA-Managed Awards

ORA Managed Proposals

ORA Managed Awards

Other Proposals

Other Awards and Gifts

Note that data populated from campus integrations cannot be edited on the data screen. Check below to see where the data is drawn from, how often the update occurs, how far back the data goes, and how to get changes made, if needed.

<b>Activity Screen Name</b>	<b>Campus System</b>	<b>Data Update Schedule</b>	<b>Data Coverage</b>	<b>Contact Information for Updates/Changes</b>
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 the 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 <a href="#">CourseEvalUM Help Center</a> .
ORA Managed Awards ORA Managed Proposals	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/Disser tation Committees	Graduate School Student Advising	Five weeks after the term ends	2018-2019 academic year	Activity Insight Team (ai-help@umd.edu)

## Activity Screens: The Basics

After clicking on an activity screen, you will see a summary screen showing your preloaded or manually entered activities. The screenshot below shows the summary screen for the Honors and Awards activity screen.

The screenshot shows the 'Honors and Awards' summary screen. At the top is a red navigation bar with 'ACTIVITY INSIGHT', 'Activities', and 'Reports' tabs. To the right are icons for help, notifications, and user profile, followed by the 'Digital Measures' logo. Below the navigation bar is a search bar labeled 'Search Honors and Awards...'. To the right of the search bar are 'Rapid Reports' and 'PasteBoard' buttons. Below the search bar is a header section with a back arrow, the title 'Honors and Awards', and three buttons: '+ Add New Item', 'Duplicate', and a trash icon. Below the header is a descriptive paragraph: 'This screen is for awards and honors including research/scholarship or teaching fellowships. To enter information about a financial award you received to support your research/work, use the Other Awards and Gifts screen.' Below the paragraph is a table with three rows of data. Each row has a checkbox on the right.

Item	
Presidential Award May 2017	<input type="checkbox"/>
Award for Winners Organization Sample May 2005	<input type="checkbox"/>
Nominated for:Super People Honor Sample Sponsor June 2001	<input type="checkbox"/>

You can click an existing record to edit it, or you can click the *Add New Item* to create a new record. Either option will bring you to the Data Entry screen.

This screenshot is identical to the one above, but the '+ Add New Item' button is highlighted with a red rectangle. The rest of the interface, including the navigation bar, search bar, header, description, and table, remains the same.

Here you should fill in all of the required fields (denoted by red asterisks) and as many of the optional fields as you would like.



**ACTIVITY INSIGHT** **Activities** Reports ?

Rapid Reports PasteBoard

**< Edit Honors and Awards** Cancel Save Save + Add Another

This screen is for awards and honors including research/scholarship or teaching fellowships. To enter information about a financial award you received to support your research/work, use the Other Awards and Gifts screen.

\* Award or Honor Name

\* Organization/Sponsor

Nominated or Awarded? ☐ Nominated ☒ Awarded

Academic Domain

Regional Scope

Description

\* Date

**Supporting Documentation (optional)**  
Use this if you want to attach PDFs, videos or other files related to this activity.

**1st Supporting Document**

Document	File Description
No File Stored <input type="button" value="Choose File..."/>	<input type="text"/>

Select the number of supporting document rows to add:

Then save your entry with the Save button at the top of the screen.

**ACTIVITY INSIGHT** **Activities** Reports ?

Rapid Reports PasteBoard

**< Edit Honors and Awards** Cancel **Save** Save + Add Another

This screen is for awards and honors including research/scholarship or teaching fellowships. To enter information about a financial award you received to support your research/work, use the Other Awards and Gifts screen.

\* Award or Honor Name

\* Organization/Sponsor

Nominated or Awarded? ☐ Nominated ☒ Awarded

## Adding an Item

Items represent any activity, entry, service, or record that is added to one of the various sections within Activity Insight.

Activity screens in Activity Insight have been customized for UMD based on the UMD Vita template and the annual activity report.

Choose any link on the main Activities screen to go to the summary screen for that activity. From there, you can add new activity items.

**ACTIVITY INSIGHT** **Activities** **Reports** ? **Digital Measures** by Watermark

Search All Activities...

[Review a guide](#) to manage your activities. [Show more](#)

**General Information**

- Personal and Contact Information
- Biography and Expertise
- Educational Background
- Post-Graduate Training
- Tenure and Rank
- Appointments at UMD
- Other Employment
- Continuing Education
- Professional Certifications and Licenses
- Professional Memberships
- Honors and Awards

**Teaching, Extension, Mentoring, and Advising**

**Research Advising**

- Participation in Thesis/Dissertation Committees
- Mentorship - Guiding Professional Development
- Professional and Extension Education
- Non-Credit Instruction
- Scheduled Teaching
- Course Evaluations
- Curricular Advising
- Teaching Innovation

**Research, Scholarly, Creative and/or Professional Activities**

- Biographical Sketch - NIH | NSF
- Publications
- Presentations
- Significant Works in Public Media
- Creative Scholarship
- Reviews of Creative Research/Scholarship
- Professional and Extension Publications
- Patents and Inventions
- Centers for Research and Creative Scholarship

**Sponsored Research**

- Active ORA-Managed Awards
- ORA Managed Proposals
- Other Proposals
- Other Awards and Gifts

When you click a link you will first see a summary screen. Here you can see all of the activities that have already been loaded or that you have entered.

To add an activity click "Add New Item" in the upper right.

**ACTIVITY INSIGHT** **Activities** **Reports** ? **Digital Measures** by Watermark

Search Research Advising...

**Research Advising** **+ Add New Item**

This screen is to list specific students or post-docs you have previously or are currently advising or mentoring. It documents your ongoing involvement with students in advising, mentoring and research efforts leading to their thesis or dissertation.

Note that involvement in thesis/dissertation committees for successfully completed research is recorded on the Participation in Thesis/Dissertation Committees screen, with data provided by the Graduate School on a per term basis.

Item	
Doctoral, Bob January 2017 - February 2018	<input type="checkbox"/>
Master's, Lilly February 2016 - June 2017	<input type="checkbox"/>

This is the data entry screen. Notice that required fields have a red asterisk.

Note: you want to fill in your information based on how you want it to look on reports, so be sure to use proper capitalization and punctuation in all fields.

Also keep in mind, these screens are designed to be used by faculty from all disciplines across campus, so some screens may have fields that don't pertain to you. You can either leave those fields blank, or if the field is required, fill it in with the most logical option for your department.

The screenshot shows the 'Edit Research Advising' form within the Activity Insight interface. The top navigation bar is red with 'ACTIVITY INSIGHT' and 'Activities' tabs. The form includes fields for First Name, Last Name, Role (a dropdown), and an Explanation of 'Other'. It also has radio buttons for 'Co-Advisor?' (Yes/No), a 'Degree Level' dropdown, and text boxes for 'Program', 'Institution if not UMD', and a larger 'Description' box. Below these are date pickers for 'Date Started' and 'Date Completed'. A note states: 'At least one date is required. If your activity is ongoing, only enter the Start Mo/Yr. If your activity was only one day, only enter the End Mo/Yr.' The bottom section, 'Supporting Documentation (optional)', allows attaching files with a 'Choose File...' button and a 'File Description' field. At the very bottom, there is a control to 'Select the number of supporting document rows to add:' with a value of 1 and an '+Add' button.

ACTIVITY INSIGHT Activities Reports ? [User Icon] Digital Measures by Watermark

Rapid Reports PasteBoard

< Edit Research Advising Cancel Save Save + Add Another

First Name [Text Box]  
Last Name [Text Box]  
Role [Dropdown]  
Explanation of "Other" [Text Box]  
Co-Advisor? ☐ Yes ☒ No  
Degree Level [Dropdown]  
Program [Text Box]  
Institution if not UMD [Text Box]  
Description [Text Area]

At least one date is required. If your activity is ongoing, only enter the Start Mo/Yr. If your activity was only one day, only enter the End Mo/Yr.

Date Started [Month/Year Picker]  
Date Completed [Month/Year Picker]

**Supporting Documentation (optional)**  
Use this if you want to attach PDFs, videos or other files related to this activity.

**1st Supporting Document**

Document: No File Stored [Choose File...]  
File Description: [Text Box]

Select the number of supporting document rows to add: 1 [Add]

## Date Handling in Activity Insight

For reporting to work properly, and for activities to be properly organized on reports, entries must have dates. Most screens will have two spaces for each date, one for month and one for year. The day is very rarely asked for. The date format in Activity Insight is [Month Name] YYYY or [Month Name] DD, YYYY, if the day is included.

For activities that are ongoing, only enter the start date, and leave the end date blank. If the activity was only one day, or a period of time within the same month, enter the end date and leave the start date blank.

\* At least one date is required. If your activity is ongoing, only enter the Start Mo/Yr. If your activity was only one day, only enter the End Mo/Yr.

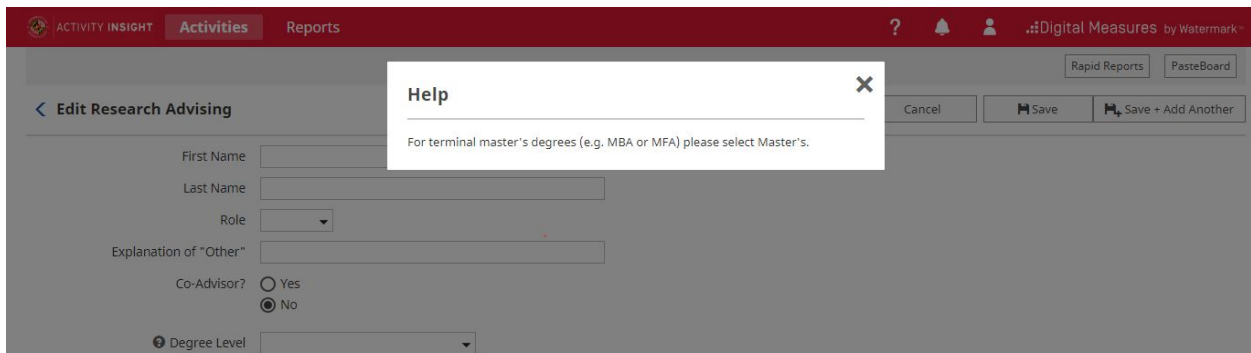
Date Started	August	2005
Date Completed		

\* At least one date is required. If your activity is ongoing, only enter the Start Mo/Yr. If your activity was only one day, only enter the End Mo/Yr.

Date Started		
Date Completed	June	2009

Some fields have additional help available through the ? help icon. In other cases, on-screen instructions provide guidance on how to enter data for the associated field(s).

 Degree Level



After filling in all required information, you may choose to add Supporting Documentation. This is completely optional. This is a way to store PDFs, videos or other files related to this activity.

To add supporting documentation, click on Choose File under Supporting Documentation.

**Supporting Documentation (optional)**  
Use this if you want to attach PDFs, videos or other files related to this activity.

**1st Supporting Document**

Document	File Description
No File Stored <input data-bbox="318 310 464 352" type="button" value="Choose File..."/>	<input type="text"/>

Select the number of supporting document rows to add:

You can add any file type you would like here, as long as it is 10 MB or less. If you would like to add multiple documents, you can click the "+Add" button on the bottom right and repeat the file upload process for each additional file.

**Supporting Documentation (optional)**  
Use this if you want to attach PDFs, videos or other files related to this activity.

**1st Supporting Document**

Document	File Description
No File Stored <input data-bbox="318 779 454 804" type="button" value="Choose File..."/>	<input type="text"/>

Select the number of supporting document rows to add:

Once you have added all of your information and documents you can click "Save" at the top of the page. This will take you back to the summary view of all of your entries for this activity screen.

*Important Note: Remember to **Save**. Click on the Save button after completing all the fields.*



Scheduled Teaching	If you want to have a change made in the scheduling system, please contact your scheduling officer.
Course Evaluations	If you have questions about the data on this screen, contact the <a href="#">CourseEvalUM Help Center</a> .
Active ORA-Managed Awards ORA Managed Awards ORA Managed Proposals	Requests for corrections to Kuali Research for any active projects can be made through your department's business administrator.
Participation in Thesis/Dissertation Committees	Activity Insight Team (ai-help@umd.edu)

Other screens may have data that was pulled from the Lyterati system. Every effort was made to bring this data in cleanly and to populate the correct set of fields. However, you should review the data loaded on these screens to make sure that the information has been correctly mapped and that the data for your activities is accurate.

If you need to make changes to any of your pre-loaded activities, or any activities you have entered, you can locate the record you want to edit and click on the link to view it.

ACTIVITY INSIGHT

Activities

Reports

?

🔔

👤

Search Educational Background...

Rapid Reports

PasteBoard

< Educational Background

+ Add New Item

🔄 Duplicate

🗑️

This screen is for undergraduate, master's, or doctoral degrees you've received. To enter information about other educational and professional training you've completed, use the Continuing Education, Post-Graduate Training, or the Professional Certifications and Licenses screens.

Item	
<div> <div>PhD (Highest Degree Earned)</div> <div>Information Transfer</div> <div>Syracuse University, School of Information Studies</div> <div>1996</div> </div>	<input type="checkbox"/>
<div> <div>MA</div> <div>Communications</div> <div>State University of New York at Albany</div> <div>1988</div> </div>	<input type="checkbox"/>
<div> <div>BA</div> <div>Communications</div> <div>State University of New York at Albany</div> <div>1986</div> </div>	<input type="checkbox"/>
<div> <div>MS (Highest Degree Earned)</div> <div>University of Maryland</div> <div>1986</div> </div>	<input type="checkbox"/>
<div> <div>BS</div> <div>Pennsylvania State University</div> <div>1982</div> </div>	<input type="checkbox"/>

Make any necessary updates to the data entry screen. Remember that all required fields(marked with an asterisk) must be filled in.  
Once finished click "Save" in the upper right.

ACTIVITY INSIGHT

Activities

Reports

?

🔔

👤

Search Educational Background...

Rapid Reports

PasteBoard

< Edit Educational Background

Cancel

💾 Save

💾 Save + Add Another

Major/Program

Information Transfer

Minor

Degree

PhD

Explanation of "Other"

Highest Degree You Have Earned?

☒ Yes
 ☐ No

Date Started

Date Completed

1996

Degree Type

Doctoral

Institution

Syracuse University, School of Information Studies

City and State

Syracuse

NY

Country

United States

Dissertation/Thesis Title

Honor/Distinction

Additional Details

Transcript

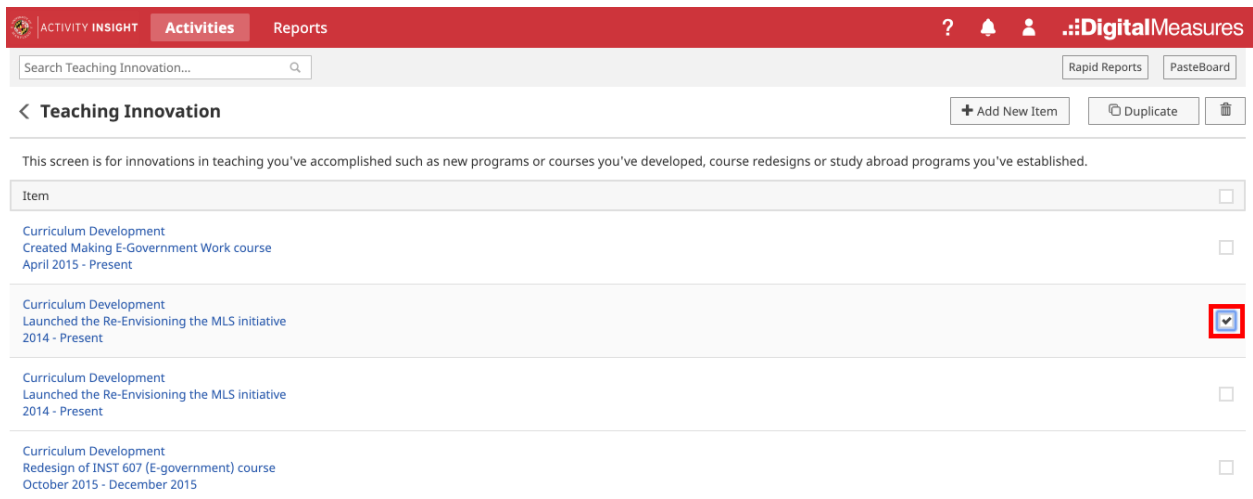
No File Stored

Choose File...



## Removing an Item

There may be times when you need to delete activities that have been duplicated or added in error. To do this, simply go to the summary screen where the record is located and select the record you want to delete by clicking the checkbox for that record:



ACTIVITY INSIGHT Activities Reports ? DigitalMeasures

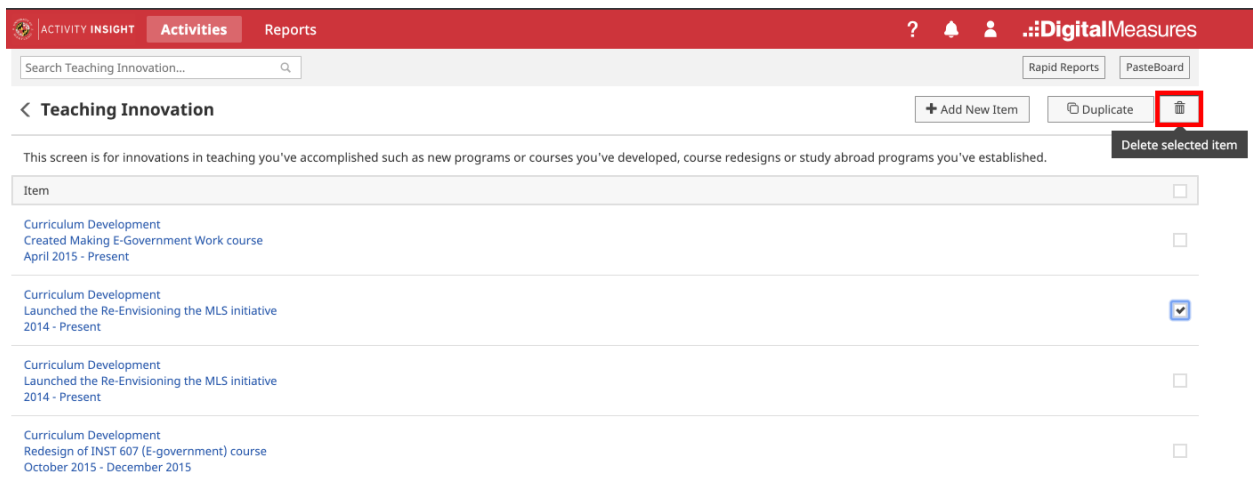
Search Teaching Innovation... Rapid Reports PasteBoard

< Teaching Innovation

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	
Curriculum Development Created Making E-Government Work course April 2015 - Present	<input type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input checked="" type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input type="checkbox"/>
Curriculum Development Redesign of INST 607 (E-government) course October 2015 - December 2015	<input type="checkbox"/>

Once you have selected the record/records you want to delete, click the trash can icon on the upper right.



ACTIVITY INSIGHT Activities Reports ? DigitalMeasures

Search Teaching Innovation... Rapid Reports PasteBoard

< Teaching Innovation

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	
Curriculum Development Created Making E-Government Work course April 2015 - Present	<input type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input checked="" type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input type="checkbox"/>
Curriculum Development Redesign of INST 607 (E-government) course October 2015 - December 2015	<input type="checkbox"/>

Delete selected item

You will get a popup box asking if you are sure you want to delete the record.

ACTIVITY INSIGHT

Activities

Reports

?

DigitalMeasures

Search Teaching Innovation...

Rapid Reports

PasteBoard

< Teaching Innovation

+ Add New Item

Duplicate

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	
Curriculum Development Created Making E-Government Work course April 2015 - Present	<input type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input checked="" type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input type="checkbox"/>
Curriculum Development Redesign of INST 607 (E-government) course October 2015 - December 2015	<input type="checkbox"/>

Are you sure you want to delete this record? This action cannot be undone.

Cancel

Delete

Select Delete. Now you will see that your record has been removed from the summary screen.

ACTIVITY INSIGHT

Activities

Reports

?

DigitalMeasures

Search Teaching Innovation...

Rapid Reports

PasteBoard

< Teaching Innovation

+ Add New Item

Duplicate

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	
Curriculum Development Created Making E-Government Work course April 2015 - Present	<input type="checkbox"/>
Curriculum Development Launched the Re-Envisioning the MLS initiative 2014 - Present	<input type="checkbox"/>
Curriculum Development Redesign of INST 607 (E-government) course October 2015 - December 2015	<input type="checkbox"/>

# Duplicating an Item

Sometimes you can save time adding activities by using the Duplicate feature. In some cases where there are two items that are almost identical, you may find it easier to duplicate one and then slightly modify it, as opposed to creating the second item from scratch.

On the summary screen, choose the activity you want to duplicate by choosing the checkbox on the right side of the screen.

The screenshot shows the 'Professional and Campus Service and Committees' screen. The header includes 'ACTIVITY INSIGHT', 'Activities', and 'Reports' tabs, along with a search bar and 'Rapid Reports' and 'PasteBoard' buttons. The main content area lists four items: 'Chair', 'Member', 'Member', and 'Member'. The 'Member' item (February 2013 - March 2015) is selected, indicated by a red box around its checkbox. The 'Duplicate' button in the top right is also highlighted with a red box.

Item	
Chair Imaginary Organization February 2015 - December 2015	<input type="checkbox"/>
Member Imaginary Organization February 2013 - March 2015	<input checked="" type="checkbox"/>
Member ABC Committee January 2001 - February 2003	<input type="checkbox"/>
Member Sample Committee April 1999 - December 2001	<input type="checkbox"/>

Then click Duplicate in the upper right.

The screenshot shows the same 'Professional and Campus Service and Committees' screen. The 'Member' item (February 2013 - March 2015) is now selected, indicated by a blue box around its checkbox. The 'Duplicate' button in the top right is highlighted with a red box, and a tooltip 'Duplicate selected item' is visible below it.

Item	
Chair Imaginary Organization February 2015 - December 2015	<input type="checkbox"/>
Member Imaginary Organization February 2013 - March 2015	<input checked="" type="checkbox"/>
Member ABC Committee January 2001 - February 2003	<input type="checkbox"/>
Member Sample Committee April 1999 - December 2001	<input type="checkbox"/>

Now you can update information for your new record.

ACTIVITY INSIGHT

Activities

Reports

?

DigitalMeasures

Rapid Reports

PasteBoard

<

Edit Professional and Campus Service and Committees

Cancel

Save

Save + Add Another

• Contribution Type

Campus Service - University

• Position/Role

Member

Explanation of "Other"

Chair

• Organization/Committee

Co-Chair

Responsibilities/Brief Description

Member

Organizer

President

Secretary

Other

• Was this compensated or pro bono?

At least one date is required. Note: For one-day activities, leave the start date blank and specify the end date. For activities started, but not completed, specify the start date only.

Start Date

February

2013

End Date

March

2015

Once you have updated all desired fields, click the Save button in the upper right.

ACTIVITY INSIGHT

Activities

Reports

?

DigitalMeasures

Rapid Reports

PasteBoard

<

Edit Professional and Campus Service and Committees

Cancel

Save

Save + Add Another

• Contribution Type

Campus Service - University

• Position/Role

Organizer

Explanation of "Other"

• Organization/Committee

Imaginary Organization

Responsibilities/Brief Description

All the imaginary responsibilities

• Was this compensated or pro bono?

Compensated

Pro Bono

At least one date is required. Note: For one-day activities, leave the start date blank and specify the end date. For activities started, but not completed, specify the start date only.

Start Date

February

2013

End Date

March

2015

You will now see your newly created record in the summary screen.

The screenshot displays the 'Professional and Campus Service and Committees' section of the Activity Insight interface. The header includes 'ACTIVITY INSIGHT', 'Activities', and 'Reports' tabs, along with a search bar and 'Rapid Reports' and 'PasteBoard' buttons. The main content area shows a list of roles with a red box highlighting the 'Organizer' role for 'Imaginary Organization' from February 2013 to March 2015.

Item	
Chair Imaginary Organization February 2015 - December 2015	<input type="checkbox"/>
Member Imaginary Organization February 2013 - March 2015	<input type="checkbox"/>
Organizer Imaginary Organization February 2013 - March 2015	<input type="checkbox"/>
Member ABC Committee January 2001 - February 2003	<input type="checkbox"/>
Member Sample Committee April 1999 - December 2001	<input type="checkbox"/>

## Importing Publications

### Overview

The Publications screen is for managing a wide variety of research and scholarly publications.

The Import Publications feature can be used to import citations directly from a number of publication databases, as well as through an uploaded BibTeX file generated from other citation managers, such as Zotero, EndNote or Mendeley.

Citation Managers are typically used to manage resources that you find while doing research, in anticipation of then citing those references while writing. They can also be used to create personal publication libraries, which can then be exported as BibTeX files to import into Activity Insight.

**Import Publications**

Your publications may exist in other systems—and we want to make adding them easy. Import your citations using one of the options below, then follow the prompts to address duplicates, match collaborators, and perform a final review to complete the process.

### Import from a BibTeX file

Import publications from other software or databases such as:

- EndNote
- Google Scholar
- Mendeley
- RefWorks
- HeinOnline
- Zotero

Choose File...

### Import from a Third Party

Select a service ORCID

Create or Connect your ORCID ID

There is no single foolproof import method to recommend for faculty across the campus. Each option has advantages and disadvantages, depending on your area of research interest and publication activity.

The **Import from a Third Party** approach, on the right side of the Import Publications screen has the following pros and cons:

- Pros: Data is pulled directly from the selected publication database or researcher profile into Activity Insight
- Cons: Each of the integrated publication databases covers different disciplines in varying degrees. For example, PubMed will include a high percentage of public health publications, but very little in social sciences or humanities. None of these resources will work equally well for all faculty members.

The **Import from a BibTeX file** approach, on the left side of the Import Publications screen has the following pros and cons:

- Pros: More control for faculty as to which publications are included in the BibTeX file, allowing for broader coverage across disciplines.
- Cons:
  - Two step process to export BibTeX file and then upload the file into Activity Insight
  - Some citation managers are limited in regards to which pieces of data are stored and/or exported to the BibTeX file.

Given the increasing use of ORCID at UMD and among funders and publishers, we recommend creating or updating your ORCID profile first, then importing directly from within Activity Insight. For the BibTeX upload, Zotero, EndNote, or Mendeley reference managers can be used to curate personal citations and generate a BibTeX file for uploading.

### **Importing is Just the First Step...**

While these import options greatly ease the burden of entering publication activity, additional manual effort will likely still be needed:

- The Import feature only handles a subset of the possible types of publications that faculty are involved in
- Most times, when publications are brought in through the Import feature, key details about the publication will be imported. Depending on the quality of the source data, things like page numbers, special characters, URLs, etc. may not appear correctly, and may need to be corrected manually.

In the following sections, the different publication import options will be described, along with details on how to set up your own personal publication profiles within the associated reference manager for your publications.

## **ORCID Use with Activity Insight**

### **Overview**

An ORCID iD is a persistent identifier that distinguishes you from other researchers and is a record that supports automatic links among all of your professional activities. Your ORCID iD and connections are stored in the ORCID registry, in an account you own and manage.

1. The ID is unique to the Researcher, which is helpful to if you have a more common name or if your name has changed.
2. The ID moves with the Researcher, meaning that if you change Universities your ID stays the same.
3. ORCID iDs can be integrated into other systems, such as Faculty Reporting Systems.

4. Some publishers require Researchers have an ORCID iD when submitting their work.
5. An ORCID iD connects you to your affiliations, work, and awards. Additionally, claiming your publications in your ORCID account ensures that you get the credit for your work.
6. ORCID iDs come with a QR code, which can be used on things like posters.
7. ORCID iDs are also used in applications for funding/grants
8. The Researcher has complete control of their ORCID iD, deciding what information to add and share and even who to share it with. The Researcher can decide the visibility for their ID.
9. An ORCID iD increases discoverability of your research, many platforms allow users to search using ORCID iDs.
10. ORCID is open, free, multi-disciplinary, international, and supports multiple languages and character sets.

### Need an ORCID iD?

1. Register for an ORCID iD at <https://orcid.org/register>.
2. When signing up, you will be asked to select your privacy settings. Here is a breakdown of what each setting means:



Public: Information is available to users of the ORCID platform/website.



Trusted Parties: Information is only available to those individuals and organizations you allow.



Private: Only visible to you.

3. Once you complete the registration form, you will need to go to your email and verify your email address. This email also has your 16-digit ORCID ID. However, this number is also available on the homepage of your account-it's at the end of the URL under "ORCID ID" at the top of the page.
4. Next, you want to link your ORCID iD to your institution. Sign out of your account and go to the sign in page and login under "Institutional Account." Select University of Maryland, College Park. If you are already logged in via CAS, the website will tell you that you are already logged in to UMD under your username. However, if you are



not logged in under CAS, you would be prompted to login to CAS as you usually would.

5. Finally, you will be asked to confirm that you want the accounts linked by signing in to your account. After linking your accounts, you may use your ORCID sign in details or any of the other linked accounts to access your account. You may link multiple accounts! If this process is confusing to you, check out this [video](#) by the University of Wisconsin-Madison.
6. Once in your account, edit your information. You can add a publish name or names you are also known as and other versions of your name. It's recommended that all other names published under are added to this field. You can make these public or private. It is recommended also to add multiple emails, this will ensure easy access if you leave your current institution.

### **Adding Publications After You Have an ORCID iD**

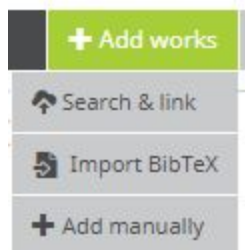
First, log into your account at [orcid.org](https://orcid.org). You can follow the directions to affiliate your account with an institution if you have not yet done so. Otherwise click Institutional account and login with your directoryID and password.

While ORCID can be used as a full online CV equivalent, with employment history, education, etc. in the context of Activity Insight, it is *most* valuable for tracking research, scholarship and creative works. In fact, the only section that exports to Activity Insight is "Works," so at this time it is not necessary to update employment, education, service, or funding, as that information comes from different sources in Activity Insight.

Before adding new works, it's best to review current works to ensure they are appear correctly with the correct categories. Book reviews may appear as journal articles or those listed as "other" may actually fall into official categories. You can click the small pencil icon to edit a work.

Next, you can add new works.

When you click "Add works," the following options appear:



First, try Search and Link, to see if you can import publications.

There are a number of different sources for publications. ORCID has a nice [overview](#), which includes recommendations by field.

It may be useful to start with [Crossref](#). You first authorize access, which runs a search in Crossref using your name. Many of the articles may already be in my profile, but you can chose to add those that are missing. Note that you may see publications by other authors with variations of your name.

If you already have a [ResearcherID](#) account, which includes your work that is present in [Web of Science](#), we recommend importing via that platform. NOTE: Web of Science is integrated into Activity Insight, so it may not be worth creating a ResearcherID for this purpose if you do not already have one.

MLA International Bibliography will be an invaluable importation resource for many Humanities scholars, as books and book chapters are included in this platform. It functions similarly to Crossref, as described above.

You can try the other platforms, especially DataCite if you have datasets you'd like to include.

Otherwise, you can add publications manually. For example, to add book chapters that appear on your CV, choose Publication under Work Category, then Book Chapter as Work Type. It is easiest to copy and past from the CV.

NOTE: ORCID does not always correctly capture journal volume, issue, and article page numbers. It may be necessary to add those manually in Activity Insight.

## Connecting Your ORCID iD to Activity Insight

Digital Measures offers a [detailed explanation](#) with step by step instructions for connecting your ORCID iD with Activity Insight for the Import from a Third Party publication import option.

## Creating a Personal Library in Zotero for use with Activity Insight

These recommendations are specific to curating your own research output using Zotero in preparation for import into Activity Insight. For more general usage guidance, visit the [Zotero](#) section of the [Citation Management Tools Guide](#) or consult the [Zotero documentation](#).

The first step is to decide how you will organize your research output within Zotero. Perhaps a collection named "My Research" or similar with sub-collections named "Conference Presentations," "Journal Articles," etc.

Depending on how many resources you need to add and how those are best accessed, try one of the following methods to get the publications into your library. Many other options are detailed on the [Zotero](#) website.

- Google the title of your publication to find the official journal/publication page, then import to the appropriate folder using the Zotero Connector extension.
- Enter the publication's DOI, ISBN, or PubMed ID in the Zotero "Add Item by Identifier" search tool.
- Add a PDF of a publication by dragging and dropping or navigating to the file. In most cases, Zotero will automatically find the accompanying citation data, including DOI.
- If you have been using Zotero and have cited any of your own work, you can drag those files into your research folder to make a copy.

Once you have a complete list of publications in your collection in Zotero, it would be best to review all the content before exporting. That reduces the time you spend manually curating resources in Activity Insight.

Activity Insight best handles the following formats using an import from BibTeX, so we recommend focusing on these types of publications when curating your personal library in Zotero:

- Articles
- Books
- Book chapters
- Conference proceedings
- Manuals
- Technical reports
- Theses/dissertations
- Unpublished
- Miscellaneous\*

\*Miscellaneous will appear as Other in Activity Insight

For specifics on generating a BibTeX file in Zotero and importing into Activity Insight, consult the [guide](#) from Digital Measures.

## Creating a Personal Library in Mendeley for use with Activity Insight

These recommendations are specific to curating your own research output using Zotero. For more general usage guidance, visit the [Mendeley section](#) of our [Citation Management Tools Guide](#) or consult [Mendeley's documentation](#).

Decide how you will organize your research output. You may use the "My Publications" collection, or perhaps create a collection named "My Research" or similar with sub-collections named "Conference Presentations," "Journal Articles," etc.

Depending on how many resources you need to add and how those are best accessed, try one of the following methods to get the publications into your library. Many other options are detailed on the [Mendeley website](#).

- Google the title of your publication to find the official journal/publication page, then import to the appropriate folder using the Mendeley Importer extension.
- Enter publication's DOI, ArXiv ID, or PMID searches into the Mendeley "Add Entry Manually" option.
- Add a PDF of a publication by dragging and dropping or navigating to the file. In most cases, Mendeley will automatically find the accompanying citation data, including DOI.

- If you have been using Mendeley and have cited any of your own work, you can drag those files into your research folder to make a copy.

Once you have a complete list of publications in your collection in Mendeley, it would be best to review all the content before exporting. That reduces the time you spend manually curating resources in Activity Insight.

Activity Insight best handles the following formats using an import from BibTeX, so we recommend focusing on these types of publications when curating your personal library in Mendeley:

- Journal/magazine articles
- Books
- Book sections/chapters
- Conference proceedings
- Technical reports
- Unpublished
- Generic\*

\*Generic will appear as Other in Activity Insight

You can also create a "Watch" folder on your computer and Mendeley Desktop will check the folder periodically for new publications to automatically import into your Mendeley account. For more information on how to set this feature up, you can may consult [Mendeley's instructions](#).

For specifics on generating a BibTeX file in Mendeley and importing into Activity Insight, consult the [guide](#) from Digital Measures.

## Creating a Personal Library in EndNote for use with Activity Insight

These recommendations are specific to curating your own research output using EndNote Online and/or Desktop, which is needed in preparation for exporting via BibTeX from EndNote for publication import into Activity Insight. For more general usage guidance, visit the [EndNote section](#) of our [Citation Management Tools Guide](#) or consult [EndNote's training and documentation](#).

Decide how you will organize your research output. Perhaps a library (Desktop) or group (Online) named "My Publications" or similar. Optionally, you can create different groups (Desktop or Online) named "Conference Proceedings," "Journal Articles," etc.

Depending on how many resources you need to add and how those are best accessed, try one of the following methods to get the publications into your library. Many other options are detailed in [EndNote's training and documentation](#).

#### EndNote Desktop:

- (Fastest) Drag and drop your publication in PDF format into the EndNote Desktop app. EndNote will look for a DOI or other index to automatically find the reference information, which will be linked to the PDF you have added.
- Use EndNote's "Find Full Text" to search databases within the EndNote app.

#### EndNote Online:

- Google the title of your publication to find the official journal/publication page, then import to the appropriate folder using the EndNote Capture Reference tool.
- Search Web of Science for the publication and add directly to EndNote (built into Web of Science database).

#### Either version:

- Search your favorite database for your publication and import the reference into EndNote.
- If you have been using EndNote and have cited any of your own work, you can drag those files into your research folder to make a copy.

Once you have a complete list of publications in your collection in EndNote, it would be best to review all the content before exporting. That reduces the time you spend manually curating resources in Activity Insight.

Activity Insight best handles the following formats using an import from BibTeX, so we recommend focusing on these types of publications when curating your personal library in EndNote:

- Articles

- Books
- Book chapters
- Conference proceedings
- Manuals
- Technical reports
- Theses/dissertations
- Unpublished
- Miscellaneous\*

\*Miscellaneous will appear as Other in Activity Insight

For specifics on generating a BibTeX file in EndNote and importing into Activity Insight, consult the guide from Digital Measures for [desktop](#) or [online](#) EndNote.

## Adding/Updating Collaborators on an Activity

*Update content below borrowed from Indiana Univ*

Faculty can add or update other collaborators on an activity within certain sections of the **Research, Scholarly, Creative and/or Professional Activities; Sponsored Research;** and **Service and Outreach** categories. Other collaborators may be added/updated to activity in one of the following ways:

1. As an Author / Editor to a Publication
2. As an Author / Presenter to a Presentation
3. As an Author / Collaborator to a Significant Work in Public Media
4. As a Collaborator to a Creative Scholarship, Center for Research and Creative Scholarship, Consulting, External, Community or Other Service, or to a Media Contribution or Outreach Presentation
5. As an Inventor to a Patent and Invention
6. As an Investigator to a Proposal or Award

ACTIVITY INSIGHT

Activities

Reports

?

Digital Measures by Watermark

Rapid Reports

PasteBoard

General Information

Personal and Contact Information

Biography and Expertise

Educational Background

Post-Graduate Training

Tenure and Rank

Appointments at UMD

Other Employment

Continuing Education

Professional Certifications and Licenses

Professional Memberships

Honors and Awards

Teaching, Extension, Mentoring, and Advising

Research Advising

Participation in Thesis/Dissertation Committees

Mentorship - Guiding Professional Development

Professional and Extension Education

Non-Credit Instruction

Scheduled Teaching

Course Evaluations

Curricular Advising

Teaching Innovation

Research, Scholarly, Creative and/or Professional Activities

Biographical Sketch - NIH | NSF

1 Publications

2 Presentations

3 Significant Works in Public Media

Creative Scholarship

4 Reviews of Creative Research/Scholarship

Professional and Extension Publications

5 Patents and Inventions

4 Centers for Research and Creative Scholarship

Sponsored Research

Active ORA-Managed Awards

ORA Managed Proposals

ORA Managed Awards

6 Other Proposals

6 Other Awards and Gifts

Service and Outreach

Professional and Campus Service and Committees

Editorships, Editorial Boards, and Reviewing Activities

4 Consulting

4 External, Community, and Other Service

4 Media Contributions and Outreach Presentations

To add/update another member of an activity, navigate to the associated activity screen. Then, click on the Add New Item or select a record on the summary screen to drill down into the item detail.

*When manually adding an activity, the first member will always be you and this is defaulted to show your user name, first and last name as it appears in UMD's system. You have the option to "override" or use a pen name by entering a different first/last name in the data fields of your row. If you have additional authors, skip down below and select the number of "Other Collaborators" rows you wish to add and click on the +Add button.*



**Authors/Collaborators**  
Please select a person from the drop-down list and/or enter their name in the input fields.

**1st Author/Collaborator**

People at University of Maryland  
Faculty, Sample: sample.faculty

First Name

Middle Name/Initial

Last Name

Select the number of author/collaborator rows to add:

The “Other Collaborator” will be labeled as the “2<sup>nd</sup>” contributor/author. Their information can be inputted in one of two ways:

1. If the other member is UMD faculty, you will be able to find them in the first drop down text box by entering their user name, first name, or last name:

**Authors/Collaborators**  
Please select a person from the drop-down list and/or enter their name in the input fields.

**1st Author/Collaborator**

People at University of Maryland  
Faculty, Sample: sample.faculty

First Name

Middle Name/Initial

Last Name

**2nd Author/Collaborator**

A'Hearn, Michael F: formerfaculty

A'Hearn, Michael F: formerfaculty

Abadi, Daniel: abadi

Abasi, Ali: aabasi

Abed, Eyad: abed

Abhyankar, Nandita Santosh: formerfac...

Abraham, Katharine: kabraham

Abshire, Pamela: pabshire

Abts, Leigh R: formerfaculty

Achterberg, Richard K: formerfaculty

Ackerman, Gary A: formerfaculty

Ad-Marbach, Gill: formerfaculty

Adams, Jeffrey: jda

to add:

or files related to this activity.

File Description

s to add:

**OR**

2. If the other member is not associated with UMD or if their user name is not listed in the dropdown, enter their information in the text boxes (First Name, Middle Name/Initial, Last Name, Institution/Company, Role) as outlined in the screenshot below. If the collaborator is an organization and not a specific person, enter the organization's name

in the Last Name field.

**Authors/Collaborators**  
Please select a person from the drop-down list and/or enter their name in the input fields.

**1st Author/Collaborator**

People at University of Maryland  
Faculty, Sample: sample.faculty

First Name  Middle Name/Initial  Last Name

**2nd Author/Collaborator**

Select or type a name...

Select the number of author/collaborator rows to add: 1

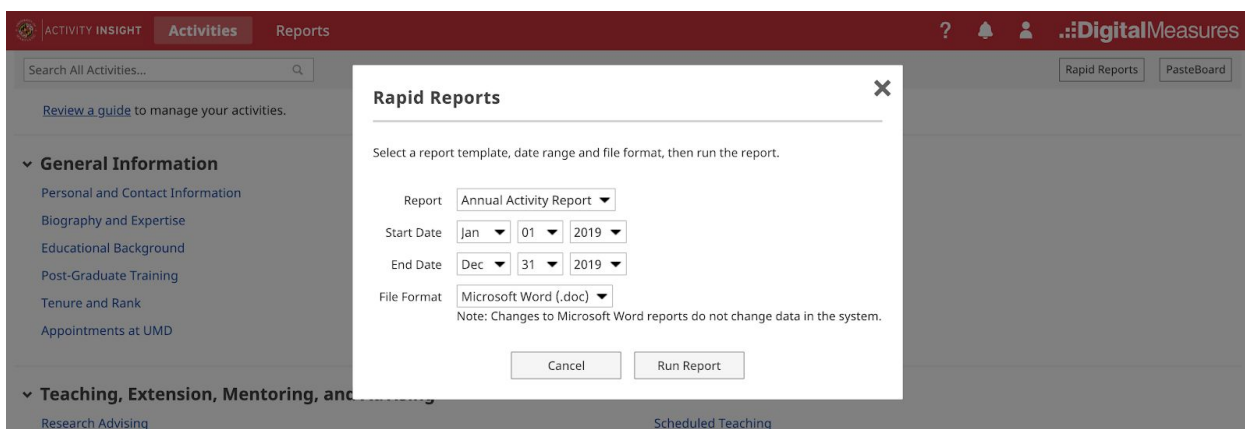
## Faculty Annual Activity Report Generation

A number of reports in Activity Insight are custom-built for UMD use. There is a custom report available for annual activity reporting.

Use Reports in the navigation bar or Rapid Reports to access reporting.



Select the report type to run, the start and end dates and the output file format. At this point, only the annual activity report is available.



The dates identify a time window; the report will include activities that occurred during this window. The default is the current calendar year.

Reports can be generated in Word, PDF or HTML formats.

After clicking Run Report, the report will be generated and downloaded. Based on the browser, you will receive a notice when the download is complete.

Open the document to see the generated report.

*Note: changes made to the downloaded report document will not be reflected in the Activity Insight system. To get correctly formatted reports, you should edit/curate your activities in the Activity Insight system.*

## Troubleshooting Issues with Reports

Here are some common challenges that arise when activities are first included in a report and ways to address them.

- Activities show up in the wrong section of the report: This happens when the Contribution Type field for the publication has not been set, or is set to "Other." To correct this and ensure your publications are routed to the correct sections of your report, you will need to curate those records. To do this, navigate to the summary screen for your publications. You will notice that each record will display, from top to bottom: the publication type, the title, the current status, and the date published. Any records that list only the title, status, and date, are the records that do not have a publication type selected. You can go into these records individually, select the correct Publication Type from the dropdown, and then save the record by clicking "Save" in the upper right. If you have already ensured that all of your publications have a Publication Type selected, but you still have publications showing up in the "Other" section of your report, those publications have "Other" selected for the publication type, and are displaying the "Explanation of Other" on the summary screen. If you would like to make sure that these publications are routed to a particular section of your report, rather than "Other Publications," you will need to go into those records

individually and select a Publication Type other than “Other,” and delete the information in “Explanation of Other,” and then save the record.

- Activities from outside of the dates selected show up in the report: Check that dates have been set for the activity.

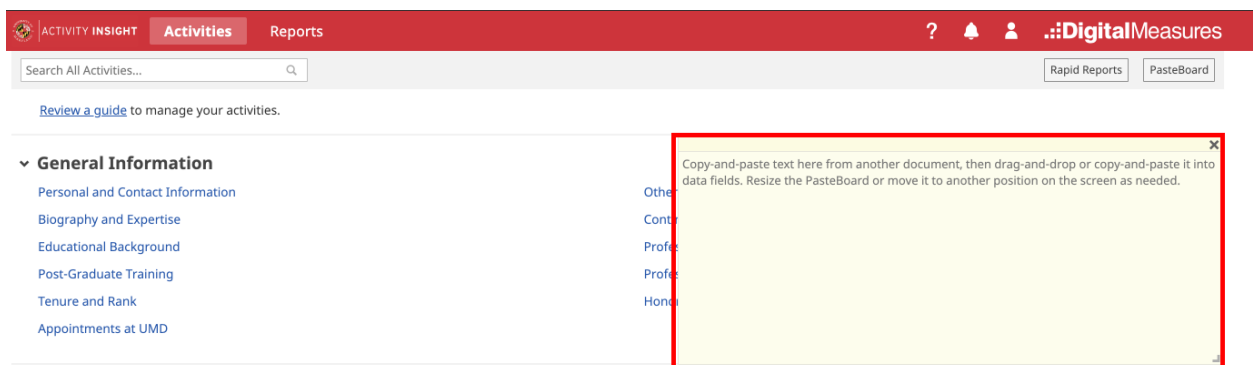
## Timesavers

Take a look at the following useful features to streamline your Activity Insight experience.

### PasteBoard



The PasteBoard feature allows you to bring in text from a word processing application (e.g., MS Word) and “standardize” for pasting into Activity Insight. Simply, copy text from another document and paste it into the PasteBoard. After you have pasted the text into PasteBoard, you can then select all (Ctrl/Cmd + A) or parts of text from it, click-and-hold on the text you selected, and drag it into a text field in the system to have it pasted into the field. You may also use the inherent Copy (Ctrl/Cmd + C) and Paste (Ctrl/Cmd + V) functions.

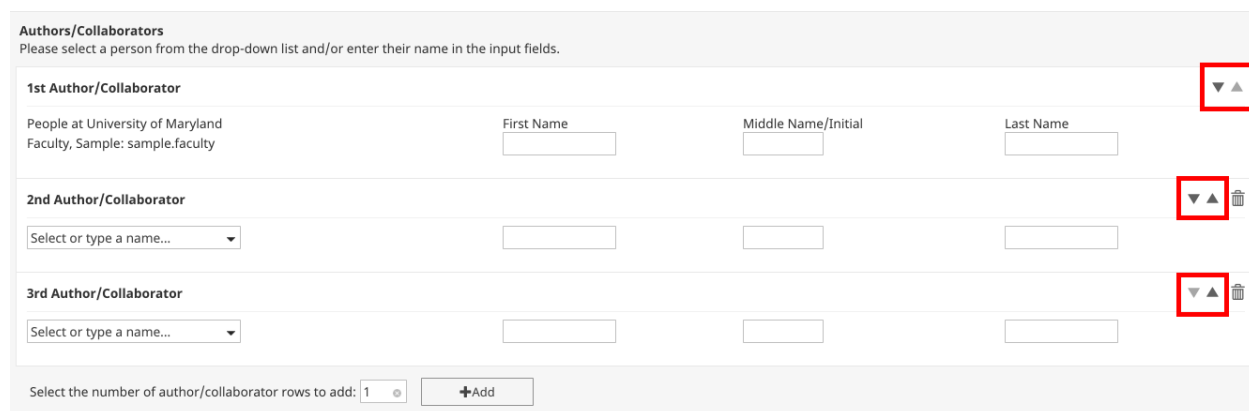


To access the PasteBoard, click **PasteBoard** in the *Navigation Menu* under Manage Activities. The PasteBoard will appear in the bottom right-hand corner of your screen and can be dragged anywhere on the screen as

needed. Any text in the PasteBoard upon logging out will remain in the PasteBoard for future sessions.

## Author Reordering

Publications/Scholarship of Discovery items default the faculty as the 1<sup>st</sup> Author/Editor. To change the ordering of the authors there are 'move' up and 'move' down arrows ▼ ▲ at the very right of the author section (next to the garbage bin). Use this arrows to adjust author ordering.



**Authors/Collaborators**  
Please select a person from the drop-down list and/or enter their name in the input fields.

1st Author/Collaborator			
People at University of Maryland Faculty, Sample: sample.faculty	First Name <input type="text"/>	Middle Name/Initial <input type="text"/>	Last Name <input type="text"/>

2nd Author/Collaborator			
Select or type a name... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>

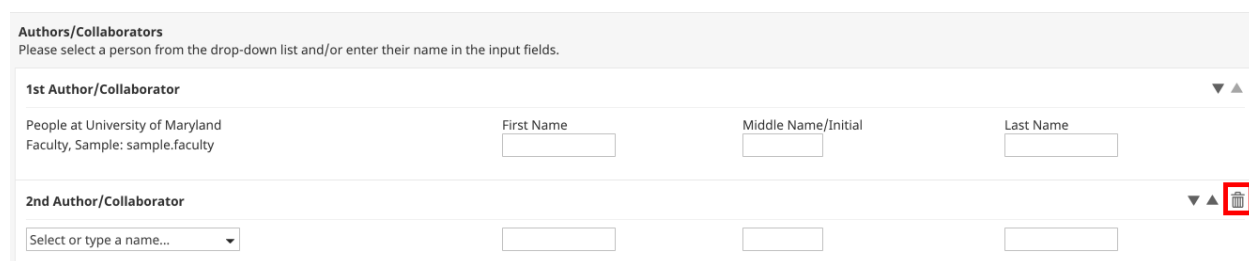
3rd Author/Collaborator			
Select or type a name... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>

Select the number of author/collaborator rows to add:

*Note: In the original image, red boxes highlight the move arrows (▼ ▲) for the 1st, 2nd, and 3rd author rows.*

## Author Deletion

Remove an author/editor by clicking on the garbage bin in far right corner of the author's row.



**Authors/Collaborators**  
Please select a person from the drop-down list and/or enter their name in the input fields.

1st Author/Collaborator			
People at University of Maryland Faculty, Sample: sample.faculty	First Name <input type="text"/>	Middle Name/Initial <input type="text"/>	Last Name <input type="text"/>

2nd Author/Collaborator			
Select or type a name... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Note: In the original image, a red box highlights the garbage bin icon in the bottom right corner of the 2nd author row.*

## Expanding Text Boxes



A large rectangular text box with a red square in the bottom right corner containing two diagonal lines, indicating a resize handle.

You may see two diagonal lines in the bottom right corner of text boxes. Clicking this area and dragging allows you to resize the text box as needed.

Once expanded, it can be minimized by double clicking the arrow again.

## Keyword Search



The Search function is always available at the top of all Activity Insight screens. This is a Keyword Search, which means it will find all activities/items that contain that word in any field and/or file attachments. You can use the search to quickly find items when unsure of which section they may be in.


## Creating Custom CVs

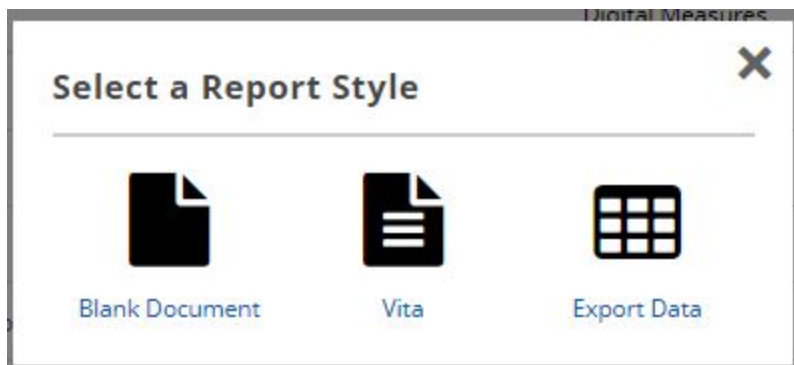
Faculty have the ability to generate a CV in the standard UMD Vita format, known as a “UMD Vita” in Activity Insight, through either the Reports or Rapid Reports features.

Additionally, faculty can also create customized CVs that vary from the standard vita, for personal and professional uses. Custom CVs are created using intuitive features such as drag and drop, word/format editors, and record filtering. To create a custom CV based on the default template provided by Digital Measures, follow the steps below.

1. Click on the **Reports** link in the main navigation menu.



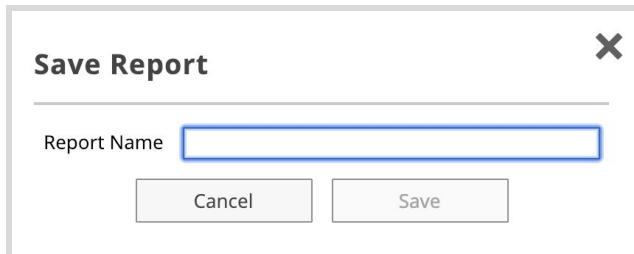
2. Click on the  button in the upper right area of the Reports screen.
3. Choose the **Vita** option when selecting the report style to begin with the default CV template. Selecting this option is the easiest and fastest way to customize your CV.



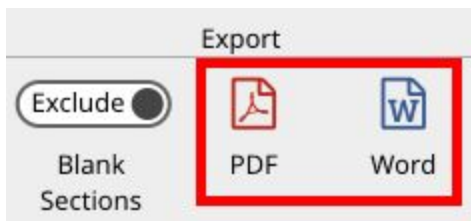
Note that the **Blank Document** style option provides access to the same tool as the **Vita** style option, but without any default report elements in place. It can be used to build up a custom CV from scratch.

4. Your CV will be auto-populated on the next screen based on your data in Activity Insight and the default CV template.
5. There are a variety of ways to customize your CV, including but not limited to those outlined below. Digital Measures has published content on how to customize your CV, including a video tutorial. Links to the Digital Measures' resources are embedded below:
  - a. Reformatting your CV
    - i. [Reordering](#) using Drag and Drop (00:54 – 1:04 of the video tutorial)
    - ii. [Adding or removing Activity Sections](#) and headers (1:05 – 1:26 of the video tutorial)
    - iii. [Adding a Text-Only Section \(no activity records\)](#)
  - b. Filtering Data displayed in Activity Sections
    - i. Click on the Settings gearwheel to filter the activities displayed in each section
    - ii. [Breaking out Publications](#) (1:27 – 2:32 of the video tutorial)
  - c. Applying a Date Range
    - i. [Specify certain years and dates](#) of data that should be included on your CV. (2:33 – 2:45 of the video tutorial)

- ii. Choose to [override \(not apply\) date ranges](#) to certain sections: (2:46 – 2:55 of the video tutorial)
6. Once you have finished customizing your CV, [you should save it for future iterations](#). Click on the **Save** button near the top right corner of the screen and enter a name for the new CV.

A dialog box titled "Save Report" with a close button (X) in the top right corner. It contains a text input field labeled "Report Name" and two buttons at the bottom: "Cancel" and "Save".

7. To download a PDF or MS Word copy of your newly created CV, click on the **PDF** or **Word** icon (respectively) under Export in the top right area of the screen.



8. After you have saved your CV, it will appear in your list of Reports under **Reports**. You may wish to modify the CV, and you can do so by clicking on it. You may also wish to *duplicate* or *rename*, which you can do by clicking on the down arrow.
- [Duplicate your CV](#)
  - [Rename your CV](#)

Digital                      Measures                      Video                      Tutorial:  
<https://www.digitalmeasures.com/activity-insight/docs/reporting.html>

## Exporting Activity Data

The third style option available from the **Create a New Report** option on the **Reports** screen is **Export Data**.



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.

< Create a New Report

SaveRun Report

1

Date Range

☐ All Dates

Start Date

January012017

End Date

December312017

2

Whom to Include

Users Selected by

AllChange Selection

Include These Accounts

Enabled Only

3

Data to Include

Fields Selected from

AllChange Selection

4

Grouping Method ?

Group by

None

5

Search Keywords ?

Search Keywords

6

File Format ?

File Format

Comma-Separated Values (.csv)

Files per Screen

Single

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.

**ACTIVITY INSIGHT** Activities **Reports** ? Digital Measures by Watermark™

[← Create a New Report](#) [Save](#) [Run Report](#)

---

1 **Date Range** ☐ All Dates

Start Date January 01 2019

End Date December 31 2019

---

2 **Whom to Include** Users Selected by **All**  
Change Selection

Include These Accounts Enabled Only

---

3 **Data to Include** Fields Selected from **All**  
**Change Selection**

---

4 **Grouping Method** ? Group by None

---

5 **Search Keywords** ? Search Keywords

---

6 **File Format** ? File Format Comma-Separated Values (.csv)  
Files per Screen Single

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

Data to Include

☐ Include All

>

☒ Most Recent

▼

☐ Common Items

>

☐ Personal and Contact Information

>

☐ Biography and Expertise

>

☐ Educational Background

>

☐ Post-Graduate Training

>

☐ Tenure and Rank

>

☐ Appointments at UMD

>

☐ Other Employment

>

☐ Continuing Education

>

☐ Professional Certifications and Licenses

>

☐ Professional Memberships

>

☐ Honors and Awards

>

☐ Research Advising

>

☐ Participation in Thesis/Dissertation Committees

>

☐ Mentorship - Guiding Professional Development

>

☐ Professional and Extension Education

>

☐ Non-Credit Instruction

>

☐ Scheduled Teaching

>

☐ Course Evaluations

>

☐ Curricular Advising

>

☐ Teaching Innovation

>

☐ NIH

>

☐ NSF

>

☐ Publications

>

☐ Presentations

>

☐ Significant Works in Public Media

>

☐ Creative Scholarship

>

☐ Reviews of Creative Research/Scholarship

Cancel

Save

Select the screen name for the data export and Save.

Data to Include

☐ Include All

> ☒ Most Recent

☐ Common Items

> ☐ Personal and Contact Information

> ☐ Biography and Expertise

> ☐ Educational Background

> ☐ Post-Graduate Training

> ☐ Tenure and Rank

> ☐ Appointments at UMD

> ☐ Other Employment

> ☐ Continuing Education

> ☐ Professional Certifications and Licenses

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> ☐ Curricular Advising

> ☐ Teaching Innovation

> ☐ NIH

> ☐ NSF

☒ Publications

☒ Contribution Type

☒ Explanation of "Other"

☒ Current Status

☒ Title of Contribution

Cancel

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 file and cross reference the column heading's code with the associated label seen on the data screen in the platform.

## 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.