



## ACTIVITY INSIGHT – GETTING STARTED

Version: February 12, 2009

*The purpose of this document is to provide instructions on how to get started entering data into Activity Insight, and to provide you with additional resources for information.*

### Accessing Activity Insight:

1. Open Browser (Internet Explorer, Netscape, etc.)
2. Go to AAP Resources Website: <http://www.aap.cornell.edu/resources/>
3. Under “AAP Faculty Resources”, click on the link to the Activity Insight website: Academic Reporting Tool (Activity Insight)
4. If you are already logged into Kerberos, you will be brought directly to the Digital Measures welcome screen. If not, you will be brought to the Cornell Kerberos login menu. If you are brought to the login menu, type in your NetID and Kerberos password (the same one used for email).

### Main Menu (on left hand side of the screen):

When you enter Activity Insight, you will see the following screen:

The screenshot shows the Digital Measures web interface. At the top left is the Cornell University logo and name. At the top right is the Digital Measures logo. Below the header, there is a navigation sidebar on the left with the following items: Manage Your Activities, Run Custom Reports, Contact Our Helpdesk, Submit Your Feedback, Privacy Statement, and Logoff. The main content area is titled "Welcome, Sarah Albrecht" and "Tuesday, February 3, 2009". Below the welcome message, it says "Below is a list of screens in your Activities Database. Click on the name of the screen for which you wish to add or modify data." The main menu is divided into two sections: "General Information" and "Intellectual Contributions". Each section contains a list of links with expandable icons (a small square with a right-pointing arrow). The "General Information" section includes: Personal and Contact Information, Administrative Data - Rank & Title Data | |, Government and Military Positions, Academic and Professional Positions, Administrative Assignments, Awards and Honors, Consulting, Education, Professional Development Activities, Licensures and Certifications, and Memberships. The "Intellectual Contributions" section includes: Artistic and Professional Practice, Performances, and Exhibits, Editor, Reviewer and Chair Activities, Intellectual Contributions - Journal Articles, Intellectual Contributions - Other Publications, Presentations, Intellectual Property, and Media Contributions.

Look to the left hand side of the screen at the **Main Menu**. The following navigational links are presented:

- 1) **Manage Your Activities** – This link will take you to the Activities Database – University menu where you will see all the screens where data can be entered. Click on the name of the screen for which you wish to add or modify data.
- 2) **Run Custom Reports** – This link allows you to obtain reports that use specialized formatting and other custom data manipulations.

There are other links on this **Main Menu** that are available for your use: 1) Contact our helpdesk; 2) Submit your feedback; 3) Privacy Statement and 4) Logoff.

- 1) Contact Our Helpdesk – sends note to Digital Measures. This option should not be chosen unless you are directed to do so by the system administrator for the college.
- 2) Submit Your Feedback – sends note to College System Administrator (Sarah Albrecht). An option to remain anonymous is available, but you may not be able to receive a response if you choose that option.
- 3) Privacy Statement – information about Digital Measures’ ability to keep faculty data secure and confidential.
- 4) Logoff – Be sure to click here when leaving the system so you do not get “hung up” and unable to log back in later.

Once you familiarize yourself with the **Main Menu**, you can start the data entry process using Activity Insight.

### **STEP 1 – Completing the Data Entry Process:**

**Faculty:** On the **Main Menu**, click on “**Manage Your Activities.**” This will take you to the main database entry page.

**Staff:** On the **Main Menu**, click on “**Manage Data.**” You will then be asked to select a user from a drop-down list. Choose the appropriate faculty member and select “Continue.” This will take you to the main database entry page.

The major data collection categories used are: General Information, Intellectual Contributions, Teaching, Research, Service, and Extension/Outreach. Under each major data collection category, there are links to data collection screens where you will be entering data.

### **Important:**

1. Once you access each screen you will see:
  - (a) A list of information already entered which you can edit, copy or delete.

- (b) A button to “ADD A NEW ITEM” which you will click to gain access to the data entry screen for new information.
- (c) Buttons that indicate “SAVE AND RETURN,” “SAVE AND ADD ANOTHER” or “RETURN CANCEL.” These buttons will save your work and redirect you to the next step or will allow you to return to the previous screen without saving your work.
- (d) A button that indicates “RETURN TO MAIN MENU” will bring you back to the “**Manage Your Activities**” screen.

**WARNING: ALWAYS MAKE SURE TO SAVE THE INFORMATION YOU WANT TO KEEP BEFORE EXITING EACH SCREEN. There are buttons at the bottom of the input screens to save your work. If you leave the screen without saving your work, you will lose your input.**

2. In Activity Insight, there will be a carat (^) symbol next to each field name on the screen that indicates the information may be made publically available in VIVO (University tool to publicly display faculty data) or other public sites, such as the college web site. Any information in these fields will have a default of “YES” to export to VIVO. However, the faculty member can override this by selecting “NO” on the drop down box at the bottom of each screen where it asks “Is record ready for general public viewing?” This selection allows the faculty member to hold back the information from public viewing and can be changed back to “YES” later if preferred.
3. Faculty are asked to complete all relevant fields on the appropriate screens. If you are unsure which option to choose from a drop-down list, save the record with that field left blank and contact the System Administrator for assistance. The item can be edited to change that field once the drop-down choice is identified. If a field is appropriately left blank, please do so.
4. Be sure to always enter a date (at least the year) for all entries. Entries that are not dated will not pull into reports. Publications that were entered with a “submitted” date must be revised to add the publication date onto that record.
5. Presentations: If a paper presented at a conference was published, choose “presenter and author” as the role, and the system will also create a publication citation for that record.
6. Please note that Activity Insight does not currently have the ability to use special characters, so some items may not be able to be reported in certain foreign languages, etc.
7. **Research Currently in Progress:** This is the only **required screen** for Architecture, Art, and Planning annual reporting. This field should be used to enter narrative data regarding faculty current research in progress that is not yet appropriate for the more formal data collection screens.

## **STEP 2 - Run Custom Reports:**

Once you have entered all of your data into Activity Insight, you can run a report that will show the data in a more read-friendly format by running a Vita Report. You can use this process to run spell-check to be sure data has been entered correctly (corrections must be made in Activity Insight). (Please note that since the data is in Activity Insight, you do not have to send this report to the Dean's office.)

To run this report, perform the following steps:

1. On the **Main Menu**, click on **“Run Custom Reports”** and you will see the following screen:

*Run Reports allows you to obtain reports that use specialized formatting and other custom data manipulations.*

**Run a Report**

**1** Select the report to run.  
Note: You must click *SELECT REPORT* if you change the report to build.  
AACSB BSQ: Faculty, Part I

**2** Select the date range to use. *More Information >>*  
Start Date Jan 01 2007  
End Date Dec 31 2007

**3** Select who to include. *More Information >>*  
Click here to select whose data to include.  
Data selected: All

**4** Select the file format. *More Information >>*  
Microsoft Word  
Note: Changes to Microsoft Word reports do not change data in the system.

**5** Select the page size. *More Information >>*  
Letter

2. On the drop down box for task #1, choose “Vita Report.” Then click on the SELECT REPORT button.
3. On the drop down box(es) for task #2, choose the desired start and end dates.
4. The remaining tasks, #3 - #5, can be left at the default settings.
5. Click on the BUILD REPORT button.
6. Once the report is built, you can open or save the report in Microsoft Word and it is fully editable if you choose to make changes to the way the report formatted the data. You may return to Activity Insight by clicking on your internet browser page.

### Rapid Reports/Pasteboard:

1. Notice at the bottom right of the screen that there are tabs for “Rapid Reports,” “Pasteboard,” and “Hide.” Using the Rapid Reports feature is a quick way to run a report for only the individual whose record you are currently in. You will be prompted through similar options as above from that window.
2. The Pasteboard allows you to copy and paste data from another source into Activity Insight prior to pasting it into a specific field. This feature is useful if you wish, for instance, to copy an entire publication citation from a word file to the pasteboard, and then cut/paste each individual element to the appropriate fields in the publication screen.
3. You may hide the Rapid Reports or Pasteboard by choosing the “Hide” tab.

**Additional resources** – This document is available at: <http://www.aap.cornell.edu/resources/> or contact Sarah Albrecht (255-6640, saa9@cornell.edu) with any questions.