Cornell University
College of Architecture, Art, and Planning

ACTIVITY INSIGHT – NAVIGATION AND FUNCTION

Version: June 16, 2017

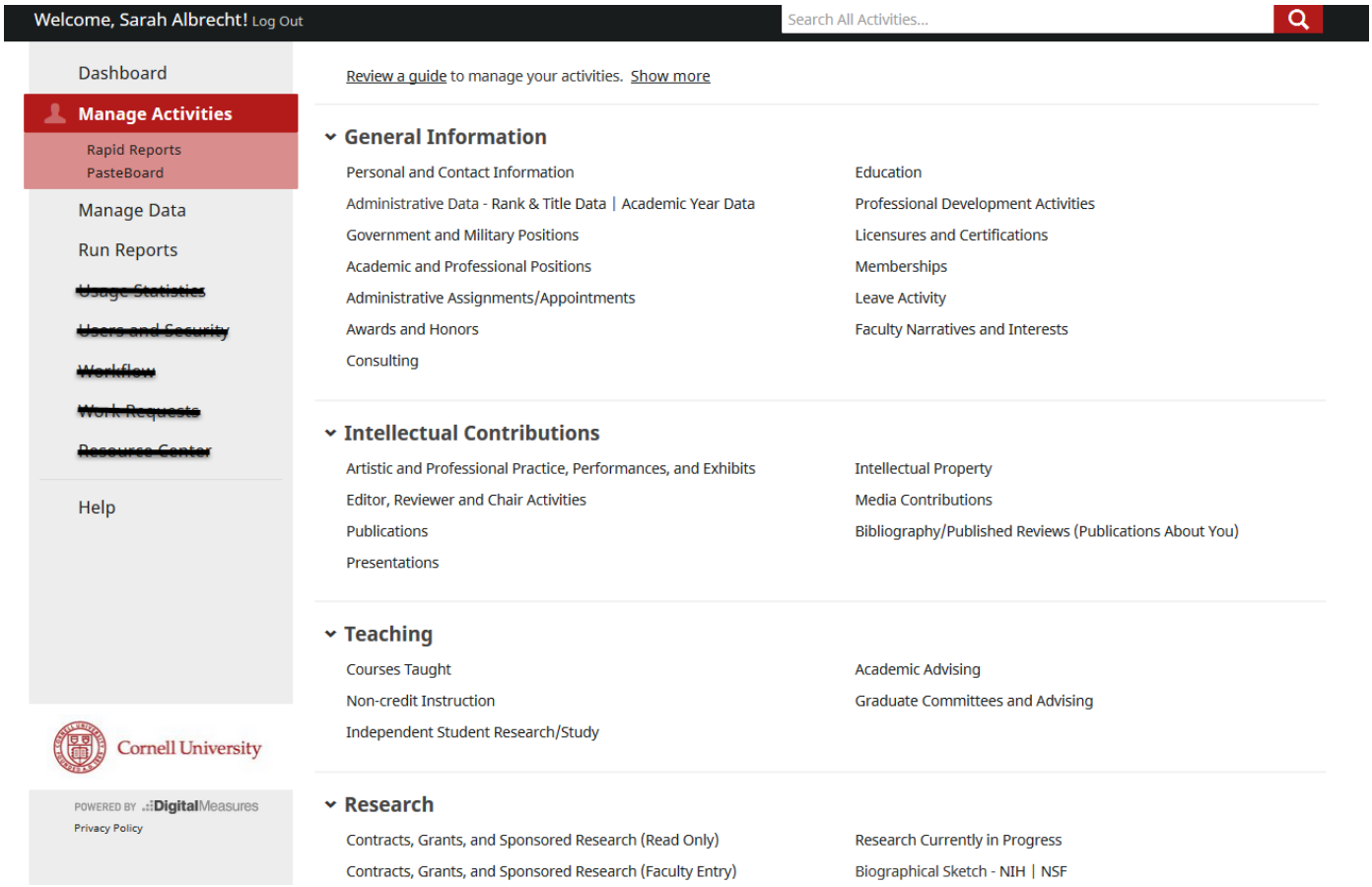
The purpose of this document is to provide instructions on basic functions of the Activity Insight system and the location of additional resources for AAP faculty users.

Accessing Activity Insight:

1. Open Browser (Internet Explorer or Firefox). You may find it slightly easier to enter data using Firefox, which supports the "type ahead" feature, but either is supported.
2. Go to AAP Faculty Resources Website: http://aap.cornell.edu/resources/faculty-resources
3. Click on the link: Academic Reporting Tool: Activity Insight
4. Activity Insight utilizes Shibboleth authentication. When you are brought to the login menu, type in your NetID and password (the same one used for email), and you will be taken to the Activity Insight home screen.

Main Menu:

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



On the left hand side of the screen are the **navigation options**. The following navigational links are presented:

1) **Manage Activities –** This link will take you to the Activities Database – University menu where you will see all the screens where data can be entered (this is the default location when you log in). Click on the name of the screen for which you wish to add or modify data.
2) **Run Reports** – This link allows you to obtain reports that use specialized formatting and other custom data manipulations.
3) **Help** – sends note to Digital Measures. Digital Measures will likely forward your inquiry to the University or College Administrator for response, so it is recommended that you contact the System Administrator directly first; she will contact Digital Measures if the issue needs to be escalated to the vendor for resolution.
4) **Privacy Policy** – information about Digital Measures' ability to keep faculty data secure and confidential.
5) **Log Out** – 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 **navigation options**, 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 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.

Please note that there is a Pasteboard available under the "Manage Activities" heading. 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 without having to toggle between applications.

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 things to know when entering data:

1. Once you access each screen you will see:

   (a) A list of information already entered which you can edit, copy or delete. Please note that the "copy" feature will copy all information exactly as the original record. Be sure to update the appropriate information, including the date, and save those changes to avoid duplicate records.
   (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," "SAVE AND ADD ANOTHER" or "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) Click the "<" next to the heading to return to the previous screen. Click and hold the "<" to go 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 top 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 that 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. The "Do you wish this record to be viewed by the public" question toward the bottom of the screen works together with the fields marked in this way to note information that is safe to share with Vivo. The default answer for this question comes up blank with each new record. You must choose a "yes" or "no" response in order to save the record. If you choose "yes," the fields marked with (^) will be fed to the Vivo project to keep that information fresh. If you choose "no," no information from that record will appear on Vivo.

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 when appropriate.

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, italics, 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. Always use the date (year) for the *reporting year* (not the date the information is entered).

STEP 2 - Run 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 reader-friendly format. There are a variety of reports to choose from; the report compiled annually for the Dean is "AAP Dean Annual Report – Individual Faculty" You can use the report feature to run spell-check to be sure data has been entered correctly, however, actual corrections must be made in Activity Insight in order to correct what shows in the report. (Please note that since the Dean's reports are pulled directly from Activity Insight, you do not have to send these reports to the Dean's office.)

To run a report, perform the following steps:

Using Rapid Reports:

1. At the left of the screen under "Manage Activities" there are options for "Rapid Reports" and "Pasteboard." 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 to choose the report you wish to run and the date range for which you wish to run it. If you wish to view your annual report exactly as the Dean will see it, choose the date range January 1 through December 31.

From the Main Menu:

1. On the **Main Menu**, click on **"Run Reports"** and choose the report you wish to run from the list provided.
2. Choose the date range for the report and the users for whom it will run (default is all for whom you have access).
3. Various Report Options may be given depending on the report selected.
4. The File Format will default to a correct format for the report, but there may be other options available such as pdf or web page.
5. Click on the RUN REPORT button.
6. Once the report is built, you can edit, review, or save the report. You may return to Activity Insight by clicking on your internet browser page.

Additional resources – This document, as well as an "FAQ" document to aid in entering specific data is available at: http://aap.cornell.edu/resources/faculty-resources or contact AAP Management Information and Reporting at 255-6640 with any questions.