

Activity Insight

Academic Administrator/Reviewer Support Guide



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Welcome to Activity Insight!

Digital Measures' Activity Insight (AI) is a fully customizable online information management system designed to organize and report on 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 Reviewers/Administrators

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

Submission Process: FAR vs. Activity Insight

AI *does not* have a "Submit Report" button as in the Faculty Annual Report (FAR) application. However, consistent with past practice, there will be a due date for faculty to 'finalize' their activity report for the previous calendar year. Administrators (e.g., department chairs) will run reports on that date or after to capture the most recent information submitted by faculty.

Logging In to Activity Insight

To log in to the DMAI application, navigate to [One.IU](#) and search for "Digital Measures – Activity Insight" to launch the Task. You'll use your **IU CAS UserID** and **Passphrase** as the login info.

*Please note that if you reach the EVPUAA DMAI [webpage](#) after logging in, your DMAI Reviewer/Admin account is not setup correctly. Please email dmhelp@iu.edu for help on modifying/setting up your Reviewer/Admin account.

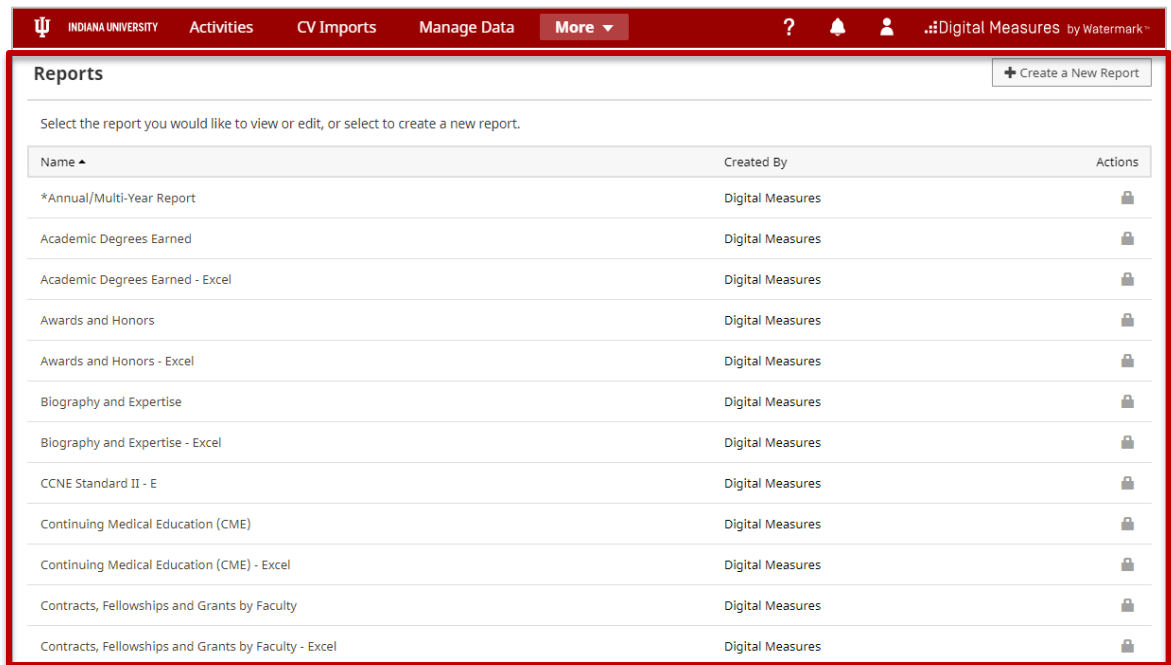
Activity Insight Overview

Activity Insight is made of a few components, all of which share common basic elements:

1. The top **Navigation Menu**.



2. **Main content area** is displayed in the center of each page, and is refreshed based on the menu item selected.



Navigation Menu

The Navigation Menu is a permanent fixture at the top of all Activity Insight screens. The menu options described below correspond with the screens for Non-Faculty Reviewer/Admin (e.g. department HR personnel, academic admin support, secretary).

- **Activities:** Non-faculty Reviewer/admins are defaulted to the Manage Data screen when this option is selected.

- **Reports:** Utilize the full reporting module to run customized reports, or create new reports, generated from the data in Activity Insight.
- **Help (?)**
 - **Contact Us:** You may send a support request using this sub-menu option. These requests are sent to the AI Support Queue and a systems admin will be in touch shortly. By default, your contact information is populated based on your IU CAS login, so please do not change this option to anonymous.
 - **Faculty Support Guide:** A link to this document.
 - **Reviewer Support Guide:** A link to the support guide for academic reviewers and administrators.
 - **IU Info & Support:** A link to the Digital Measures web page on the University Academic Affairs (UAA) website.

Important Note: The utilities and functionally that are displayed here will depend on whether you a Faculty Reviewer/Admin or Non-Faculty Reviewer/Admin in Activity Insight. If you are both a faculty and reviewer/admin (e.g. Dean) you will have more options than a reviewer/admin (e.g. administrative support).

Manage Data

The Manage Data screen is the default home page for a non-faculty Reviewer/Admin, who are setup with manage data reviewer/admin role access as explained in the *Reviewer/Admin Role* section. This utility allows for the Reviewer/Admin to review Activity Insight data as a faculty member (i.e. view/edit data as the faculty). You will only be able to manage/review the data for faculty of the department/school of which you are an admin. If you are setup with View-Only access, you will not be able to manage data for faculty. This is based on your Reviewer/Admin role setup in Activity Insight (e.g. Department Admin, School Admin, etc.) as explained later in this document.

To manage data for a faculty:

1. Click on the **Manage Data** link in the top navigation menu.



2. Select the faculty from the **User Dropdown** List and then click on the **Continue** button.


Manage Data

Manage Data enables you to manage data for other users or entities within your system. If you are entering a lot of data, it may be faster to load this from CSV files rather than by using this utility. All changes made using this utility are audited. Manage Data sessions open in a new tab.

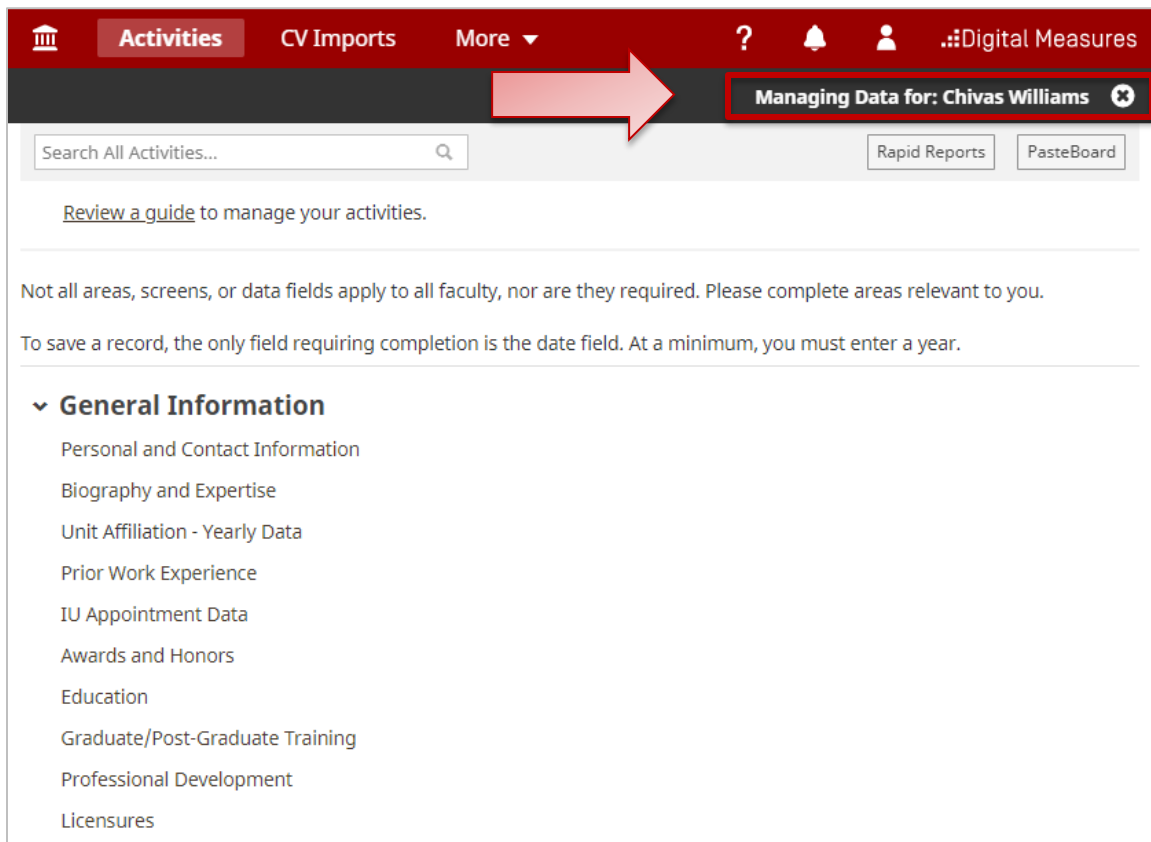
Manage Data for Users

Show*
Enabled Accounts only

User*
Williams, Chivas (chicwill)

CONTINUE 

Once you click the Continue button, a new browser window will open and you will be managing data for the selected faculty member. **There is also a notification just under the main menu to identify the faculty for which you are managing data.**



The screenshot shows the top navigation bar of the system. The main menu is dark red with white text. On the right side of the main menu, there is a notification: "Managing Data for: Chivas Williams" with a close button (X). A red arrow points from the "CONTINUE" button in the previous screenshot to this notification. Below the main menu, there is a search bar for "Search All Activities...", a "Rapid Reports" button, and a "PasteBoard" button. The main content area has a heading "General Information" with a dropdown arrow, followed by a list of categories: Personal and Contact Information, Biography and Expertise, Unit Affiliation - Yearly Data, Prior Work Experience, IU Appointment Data, Awards and Honors, Education, Graduate/Post-Graduate Training, Professional Development, and Licensures.

To *stop* managing data for a user, click on the X next to the faculty's name in the black notification banner. Then select the Stop Managing Data button.

Managing Data for: Chivas Williams

Search All Activities...

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

Not all areas, screens, or data fields apply to all faculty, nor are they required. Please complete areas relevant to you.

To save a record, the only field requiring completion is the date field. At a minimum, you must enter a year.

▼ **General Information**

- Personal and Contact Information
- Biography and Expertise
- Unit Affiliation - Yearly Data
- Prior Work Experience
- IU Appointment Data
- Awards and Honors
- Education
- Graduate/Post-Graduate Training
- Professional Development
- Licensures

Department Chair Review

If you want to add a report/review to a faculty's individual profile as a department chair/administrator, here are the steps to follow:

- Login to your own DMAI account.
- Click on "**Manage Data**" on the left side of the screen.
- If you have permission, you will then see a screen that says "**Manage Data for Users**" ... select by name (e.g., type in a name) and hit **Continue**.
- You'll then be logged "in" that faculty member's account – at the top of the screen you'll see "You are currently managing data for X".
- Scroll down to Supplemental. Click on **Annual Reports: Supporting Comments/Attachments** and then click on the particular Calendar Year X. If there is no attachments added for a particular calendar year then click "**Add New Item**" and enter a Calendar Year X. Here, you can add an attachment/s (e.g.,

- Review) and add your comments under the "**Comments**" section for each attachment you add.
- Once done, click on the "**Save**" button.

Delegates

In addition to being setup as a department/school/campus Reviewer, one can also have access to manage data for individual faculty. This is known as a one-to-one faculty delegation. Access for this functionality is setup through AI System Administrators. To request one-to-one delegate access, email dmhelp@iu.edu.

Reports

The Reports component allows reviewers 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/Multi-Year Report**. This is the primary report that will be run; it includes all of the faculty's activities that they have filled out, and CV, along with any attachments added to the Supplemental section.

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 the DMAI system. Select the type of report you wish to run from this page (scroll up and down). Once selected, the next screen will display the reporting options for the selected report. *Note: there are also MS Excel versions of most of the available reports. Use this version to output to Excel. Use the regular, non-Excel version to output to PDF or MS Word.*

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
*Annual/Multi-Year Report	Digital Measures	
Academic Degrees Earned	Digital Measures	
Academic Degrees Earned - Excel	Digital Measures	
Awards and Honors	Digital Measures	
Awards and Honors - Excel	Digital Measures	
Biography and Expertise	Digital Measures	
Biography and Expertise - Excel	Digital Measures	
Contracts, Fellowships and Grants by Faculty	Digital Measures	
Contracts, Fellowships and Grants by Faculty - Excel	Digital Measures	
Courses	Digital Measures	
Courses - Excel	Digital Measures	
Creative Works by Faculty	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)

< Run *Annual/Multi-Year Report Run Report

[Download this report's template](#)

1 **Date Range**

Start Date: January 01 2017

End Date: December 31 2017

2 **Whom to Include**

Users Selected by: All [Change Selection](#)

Include These Accounts: Enabled Only

3 **Report Options**

a) Do you want to list teaching or research first? Teaching First

b) Do you want to hide sections without any activities? Hide

4 **File Format**

File Format: Microsoft Word (.doc)

Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size: Letter

- 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.

< Run *Annual/Multi-Year Report Run Report

[Download this report's template](#)

1 Date Range Start Date January 01 2017 End Date December 31 2017

2 Whom to Include Users Selected by All [Change Selection](#) Include These Accounts Enabled Only

3 Report Options a) Do you want to list teaching or research first? Teaching First b) Do you want to hide sections without any activities? Hide

4 File Format File Format Microsoft Word (.doc) Changes made to the Microsoft Word document will not be reflected in the system. Page Size Letter

Include Groups (Department/School)

Click on the **Campus + Department** arrow to expand your department options (based on your assigned admin reviewer role), and select one or more departments. Click on the Save button to finish.

Individuals or groups to include

Campus

Campus + College

Campus + Department

- Bloomington, Applied Health Science
- Bloomington, Business Operations & Decision

Individual

Cancel Save

Include Individuals

Click on the **Individual** arrow to expand to a list of individuals (based on your admin/dept reviewer role) options, and select one or more individuals. Click on the Save button to finish.

Individuals or groups to include

- > Campus
- > Campus + College
- > Campus + Department
- ▼ Individual
 - Brush, Sage: saglbru
 - Hoosier, Johnny: jjhoos
 - Lane, Penny: plane
 - Tester, Timothy: ttester
 - Vandelay, Arthur: artvand
 - Zlacks, Robert: zlacksr

Cancel Save

3) **Report Options:** you can customize the arrangement of the report output by a) specifying whether you'd prefer teaching or research activities are first, and b) if you wish to hide/omit sections without activities.

< Run *Annual/Multi-Year Report Run Report

[Download this report's template](#)

1 Date Range Start Date: January 01 2017 End Date: December 31 2017

2 Whom to Include Users Selected by: All [Change Selection](#) Include These Accounts: Enabled Only

3 Report Options

- a) Do you want to list teaching or research first? Teaching First
- b) Do you want to hide sections without any activities? Hide

4 File Format File Format: Microsoft Word (.doc) Changes made to the Microsoft Word document **will not** be reflected in the system. Page Size: Letter

4) **File Format:** choose your output file format (MS Word, PDF, or Web page) and page size (Letter, A4) under this reporting option. *Note: In order to export a report in MS Excel (.xls), you*

must choose the Excel version from the report selection screen.

< Run *Annual/Multi-Year Report Run Report

[Download this report's template](#)

1 Date Range Start Date January 01 2017 End Date December 31 2017

2 Whom to Include Users Selected by All [Change Selection](#) Include These Accounts Enabled Only

3 Report Options a) Do you want to list teaching or research first? Teaching First b) Do you want to hide sections without any activities? Hide

4 File Format ? File Format Microsoft Word (.doc) Changes made to the Microsoft Word document **will not** be reflected in the system. Page Size Letter

Create a New Report – create a custom report by selecting the *Create a New Report* button at the top-right of the report selection screen. You can setup 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*;
- 3) 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*.
- 4) Specify the report output; by default the output is CSV. You can change to PDF or MS Word – *Option 6: File Format*.

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
*Annual/Multi-Year Report	Digital Measures	
Academic Degrees Earned	Digital Measures	
Academic Degrees Earned - Excel	Digital Measures	
Awards and Honors	Digital Measures	
Awards and Honors - Excel	Digital Measures	
Biography and Expertise	Digital Measures	
Biography and Expertise - Excel	Digital Measures	
Contracts, Fellowships and Grants by Faculty	Digital Measures	
Contracts, Fellowships and Grants by Faculty - Excel	Digital Measures	
Courses	Digital Measures	
Courses - Excel	Digital Measures	
Creative Works by Faculty	Digital Measures	

< Create a New Report Save Run Report

1 **Date Range** All Dates

Start Date: January 01 2017

End Date: December 31 2017

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

Once finished setting up the reporting options, click on the Run Report to create the file.

Reviewer/Admin Roles

The Reviewer/Admin Roles below are setup by the AI system administrators. The default set up for a department/reviewer admin will be View-Only. If you have questions or to setup access as Reviewer/Admin or Faculty Delegate, email dmhelp@iu.edu.

Department Reviewer/Admin: This admin role has the ability to run all pre-defined custom and ad-hoc reports, along with the ability to manage data for all faculty members within their department.

(View-Only) Department Reviewer/Admin: This admin role has the ability to run all pre-defined custom and ad-hoc reports for faculty members within their department.

School Reviewer/Admin: This admin role has the ability to run all pre-defined custom and ad-hoc reports, along with the ability to manage data for all faculty members within their school.

(View-Only) School Reviewer/Admin: This admin role has the ability to run all pre-defined custom and ad-hoc reports for faculty members within their within their school.

Campus Reviewer/Admin: This admin role has the ability to run all pre-defined custom and ad-hoc reports, along with the ability to manage data for all faculty members within the entire campus.

(View-Only) Campus Reviewer/Admin: This admin role has the ability to run all pre-defined custom and ad-hoc reports for faculty members within their campus.

One-to-One Faculty Delegate: This admin role has the ability to run reports and manage data for all specific, individual faculty member(s) rather than for an entire department, school, or campus.

Faculty Reviewer/Admin vs. Non-Faculty Reviewer/Admin: If you are both faculty and hold a reviewer/admin role (e.g. Dean), the AI screens and navigation menu options available will vary from those for non-faculty reviewer/admin (e.g. administrative support, department secretary).

Resources and FAQ

For any questions or feedback contact our support email at dmhelp@iu.edu.

To access the Frequently Asked Questions (FAQ), please refer to the [FAQ Guide](#).