Activity Insight
Administrator/Reviewer
User Guide
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Welcome to Activity Insight!

Activity Insight, an online information management system developed by Digital Measures, is designed to collect, manage and report on your achievements in the areas of teaching, research, creative and service. It also provides the ability to generate custom reports from the data while keeping information secure.

Benefits to Administrators/ Reviewers

Activity Insight allows administrators and reviewers to efficiently review and report on faculty activities including teaching, research and service. The system lessens the burden on administrators by providing them the option to run a single report for all faculty within a department, college or university. In addition to the reporting feature, administrators have the option, depending on their role and permissions, to “login” as the faculty and manage and/or review data in the system.

Administrator/Reviewer Roles

The Reviewer/Administrative Roles are setup by the Activity Insight system administrators according to your role and area within the University. If you have questions or to request access as Reviewer/Admin or Faculty Delegate, please email the UA System Administrator at dmhelp@ua.edu.
Logging In to Activity Insight

The University of Alabama has partnered with Digital Measures to provide Administrators/Reviewers with a single sign on user account. To access the Activity Insight database, navigate to myBama.ua.edu and log in using your myBama user name and password. Once you are logged in to myBama, on the left hand menu bar select the Faculty option. From the Faculty tab you will see the icon for Digital Measures. Click on the icon and you will be logged in to the database.

Activity Insight Overview

Once you are logged in to the system, you will be directed to the Activity Insight home page.

The home page is made up of two main components:

1. The Navigation menu (left-hand menu)
2. Manage Activities Screen (main content area)
The Navigation Menu

The Navigation Menu will be viewable on the left-hand side on all screens in Activity Insight and contains the basic navigation links. The navigation options on the menu provide the following functions described below and in more detail later in this guide.

**Important Note:** Depending on the permissions your role is assigned, you may not have all the utilities displayed or described below. 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).

1. **Manage Activities:** Enter or manage YOUR teaching, research/creative activity, and service activities.
   - **Rapid Reports:** generate a sample report such as your CV or Annual Report using a start and end date.
   - **PasteBoard:** Allows you to drag and drop text within Activity Insight from a word processing application (MS Word).

2. **Manage Data:** Enter or manage OTHER USERS teaching research/creative and service activities.

3. **Run Reports:** Run custom built reports based on the information entered into Activity Insight.

4. **Help:** Send a question, concern or suggestion to the UA System Administrator.
Manage Activities

For *Faculty Reviewer/Admin* users when you log in, you will automatically end up at the Manage Activities Main Menu. The Manage Activities Screen (see below) is organized into categories: General Information, Teaching/Mentoring, Scholarship/Research and Service.

The Manage Activities utility enables users to capture and manage teaching, research, creative, and service achievements.

At the top of the Manage Activities page - *Review a guide to manage your activities* - provides a link to a universal Faculty Guide that is maintained by the vendor, Digital Measures. The majority of that content is included in the UA user guides; however, if you would like to review the universal document click on *Review a guide*.

Under each section heading on The Manage Activities page is a list of data collection screens in your system.

**Important Notes:**

*The Activities you see on your Manage Activities screen may differ from those in the screen shot above. The activities that appear on this screen will be based on your assigned school/department.*
Manage Data

For *Non-Faculty Reviewer/Admin* users who are setup with manage data reviewer/admin role access the Manage Data screen is the default home page. The Manage Data screen allows for the Reviewer/Admin to review and edit data on the faculty member’s behalf in Activity Insight. You will only be able to manage/review the data for faculty of the department/school if you are given administrative access.

To manage/view data for a faculty:

1. Select on the **Manage Data** from the Navigation menu.
2. Select the faculty from the **User Dropdown** list.
3. Click on the **Continue** button.

Once you have successfully selected a faculty member to manage data, you will be navigated to a new browser window and will see a notification at the top of the page (in crimson) informing you of which faculty you are managing data.

Select the title for the screen you would like to review or enter data in and the screen will appear for entry and review.
To stop managing data for a user, close the active page. This will take you back to the main Manage Data screen and a notification to inform you that you are no longer managing data will be at the top of the page.

Faculty Delegates

Individuals can also have access to manage data for individual faculty by being assigned as a delegate. Faculty are permitted to assign another individual within the University system as one to one delegates in Activity Insight. This role allows individuals the ability to enter activities in the system for the faculty member by having access to manage their data and run reports. If you would like to request an individual have delegate access for your information please email dmhelp@ua.edu.
Reports

Activity Insight has two different options for report running: **Rapid Reports** and **Run Reports**. Both are discussed below:

**Rapid Reports**

Rapid Reports provide the user/Administrator Reviewer to run reports on your (or the faculty member you are managing data for) information quickly and easily. Since this function allows you to run reports from the same pages into which you enter data, Rapid Reports provides you the opportunity to see the effect of any changes you have made to your (or someone else’s) activities.

To access this feature, select **Rapid Reports** under the Manage Activities menu.

You will then be able to select the report you would like to run, the date range and the format of the output by entering in the fields shown.

**Important Note:** *If you are managing data for another faculty member and try to run Rapid Reports, the report box will notate the report being run will only be using data for the user you are currently managing.*
Once you have entered in the requested fields select **Run Report** to view the data.

**Run Reports**

For the Administrator/Reviewer, Run Reports functionality provides the ability to run system built reports or create custom reports for all or select faculty in their administrative area or college.

To Run Reports, select **Run Reports** from the left hand Navigation Menu.

This will navigate you to the report screen that will list all the available reports in the system. Select the type of report you wish to run from this page (scroll up and down).

**Important Note:** Not all available reports are shown in the above examples. Nor will all users have all above reports depending on security role and college.
After selecting the report you would like to run, a box with list of steps will be displayed. Follow the number of steps entering in the information for each step.

**Important Note:** Most of the reports are date defined which means it is very important for any activity you enter in the system to have at least a year associated with it.

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)

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).
   
   a. To select certain individuals, or an entire group, click on the **Change Selection** link in step 2.
b. To include certain groups such as particular departments click on **Department** to expand your department options (based on your assigned administrative reviewer role).

c. Select the appropriate department(s) you would like to narrow the report down to from the list provided and click **Save**.

d. The new selected number of departments will show up on the report steps screen by **Whom to Include** step.

e. To include specific individuals, click on the **Individual** under the change selection option to expand your individual options.
f. Select the appropriate individual(s) you would like to narrow the report down to from the list provided and click **Save**.

![](image1.png)

g. The newly selected number of individuals will show up on the report steps screen by **Whom to Include** step.

![](image2.png)

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

Once you have entered in the requested information in the report steps click on **Run Report**.

![](image3.png)

**Important Note**: If you feel data is missing from your report, sometimes it is helpful to see how the report is built and what screens/fields are pulling into the report. You may download a report’s logic template showing how the report you selected is built by selecting “Download this report’s template.”

![](image4.png)
Create a New Report

Create a New Report feature allows administrators/reviewers to create a custom report by selecting the Create a New Report button at the top right of the report selection screen.

After selecting Create a New Report, a box with list of steps will be displayed. Follow the number of steps entering in the information for each step.

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)

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). – See specific instructions regarding selecting particular departments/individuals above in Run Reports section.
3. **Data to Include:** allows the user to select certain data from certain screens to include in the report.

4. **Grouping Method:** allows the user to select how the information on the report being created is grouped.

5. **Search Keywords:** allows the user to run reports only including data that contain items/words specified by the user in the Keyword Search box.

6. **File Format:** allows the user to select what type of output they would like for the report.

Once you have completed setting up the reporting options, click on the **Run Report** to create the file OR click on **Save** to save the report in your report list for the future.

**FAQs**

To access the Frequently Asked Questions (FAQ), please refer to the FAQs.