Activity Insight
Faculty User Guide

http://provost.ua.edu/activity-insight.html
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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 Users**

Activity Insight provides many benefits to its users including eliminating the need to periodically and repetitively request information on your teaching, research, and service achievements. Faculty members can also generate reports such as CVs and annual reviews once their information has been entered in the system.

**Security**

Digital Measures has taken numerous precautionary steps to create a safe environment for the information stored. In addition, the security steps they have taken, you are able to download a full copy of all your data at any time.

To read more about how Digital Measures handles the security of the data, click [here](#). To read more about data privacy, click [here](#).

**Access to Data**

Faculty will have access to their own data. Other individuals who could access your data are determined by the user access and permissions which was decided by the University depending on one’s role. Typically, those who are in your academic leadership chain (Department chairs, deans, assistant deans, etc.) and other university-level administrators will have access to your data as well as their own.
Logging In to Activity Insight

The University of Alabama has partnered with Digital Measures to provide Faculty 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 Activity Insight. 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.

1. **Manage Activities:** Enter or manage your teaching, research/creative 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. **Run Reports:** Run custom built reports based on the information entered into Activity Insight.

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

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 this document; 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:**

1. *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.*
2. Some screens will have a description at the top of the page describing what activities are appropriate for that screen. To review a full list of the descriptions of Activities, visit the UA Screen Summary Reference Guide.

When you first visit Manage Activities, it would be good to become familiar with each section by reviewing the screens accessible from the main page. To access a screen, click its name and the summary screen (see below) displays records that are stored for that screen.

There are four possible actions you can take from the resulting screen, although not all of these actions will always be available:

- To add a new record, select the + Add New Item button.
- To import items in bulk, select the Import Items button (available only for the Publications screen).
- To delete a record, select the appropriate check box, and then select the button (can’t delete entries which have been imported for you from another UA system).
- To copy an existing record, check the box to the right of the name and select the Duplicate button. The system will create a duplicate record that you must then save in order to keep the copy.

**Important Note:** Read-only records that you can view but not edit or delete have been added to the system on your behalf by the University Administrator. If records need revision, please contact your college staff representative or University System Administrator at dmhelp@ua.edu.
**Adding an Item**

To add any activity, entry, services or record to a screen select the button near the top of the screen.

From there you will be navigated to the associated screen (see below) to complete the fields. You are encouraged to complete as many fields as possible that relate to the entry being added.

**Important Note:** When adding an item, make sure you enter the date associated with the entry. The date field is extremely important as most of the reports in the system pull based on dates.
Saving Records

When adding an activity to the system, it is important to retain any entries/revisions by saving your work. To preserve any work, select the or button at the top of the screen. If you try to exit from a screen containing unsaved changes, a warning message will display to determine whether you would like to return to the screen and save your modifications before proceeding.

Duplicating an Item

In some cases where the items under a section are almost identical, it may be logical to duplicate an item and slightly modify it instead of manually entering the information again. You can do this when viewing the summary list for a section. To duplicate or copy an entry:

1. Click on the checkmark box for the item you wish to duplicate
2. Click on the Duplicate button

By selecting duplicate, it will copy the entry you selected and allow you to make edits where necessary then save the record.
Removing an Item

To remove or delete an item from your activities

1. Click on the checkmark box for the item you wish to delete
2. Click on the (trash can) button

**Important Note:** Once an item is removed from the system it CANNOT be retrieved so please be certain the item you are deleting is appropriate. In instances where data has been imported from other systems on your behalf you will not have the option to remove an item.

Publications

There are several methods that can be used to get citation information into the Publications screen. Below we will briefly discuss the methods. For detailed information on how to import publications from supported web databases please refer to the Import Publications Reference Guide.

**Import Publications** - Faculty can import publications from certain web databases supported by Activity Insight (EndNote, Mendeley, Web of Science, Google Scholar, RefWorks, Zotero, Scopus, Crossref, or PubMed) by clicking on the **Import** icon at the top of the Publications Summary screen.
The two ways to import citations into Activity Insight are from a BibTeX file or from a Third Party database.

**Import from a BibTeX file**

1. Download the citation file (.txt file format) to your computer from the reference manager or other databases (e.g. Google Scholar, RefWorks, Web of Science, Zotero).
2. Click on the **Publications** in Activity Insight.
3. Click on the **Import** button.
4. Under the **Import from a BibTeX file** header, click on the **Choose File...** button to select a BibTeX file to upload from your computer.
5. Click on the **Continue** button.
6. The next screen will prompt you to match the publication with other University of Alabama user accounts. If you select to Match Contributors please see Digital Measures screen guide located [here](#).

BibTeX is the most widely supported standardized way to compile publication citations in a file. The Publications screen allows you to load exported BibTeX files into Activity Insight from a variety of reference managers or databases.
7. Review your item(s) to be imported and click on the **Finish Import** button to complete importing the items.

More information on BibTeX Imports, please view UA’s **Import Publications Reference Guide**.

You may also reference Digital Measures BibTeX Import Guide [here](#).

**Import from Third Party**

Activity Insight also partners with third party databases such as Scopus, Crossref and PubMed which allows publications directly imported into Activity Insight.

1. Click on **Publications** in Activity Insight
2. Click on the **Import** button which will take you to the Import Publications search box (see screenshot above).

   a. Under the **Import from Third Party** section, select either **Scopus**, **Cross**, or **PubMed** as your third party source.
b. The search criteria has a default depending on which source you select:
   i. *Scopus* - the default search is based on **Publication Year** and **Author Name** (your last name and first initial).
   ii. *Crossref* - the default search is based on **Publication Date** and **Author** (full name).
   iii. *PubMed* - the default is based on your last name and first initial.

c. To access additional search criteria, select the **Add Search Criteria** link and use the dropdown menu to specify new search criteria and enter search text.

d. Select **Search Scopus**, **Search Crossref**, or **Search PubMed** to locate matching publications.

3. Once the search has finished and the results appear, click on the checkmark box for the publications you wish to import. Then, click Continue.

4. The next screen will prompt you to match the publication with other University of Alabama user accounts. If you select to Match Contributors please see Digital Measures screen guide located [here](#).

5. Review your item(s) to be imported and click on the **Finish Import** button to finalize the addition of the selected publication.
**Manual Entry** - You can enter citation data by typing it in the fields within the publications screen. Once you navigate to the **Publications** screen, click on **Add New Item**.

This will take you to the data screen, where you can begin recording your publication information.
1. To add a collaborator to a publication entry, click on the Add button in the Authors/Editors/Translators box
2. Select a university collaborator from
   a. the People at The University of Alabama drop down Menu OR
   b. Type in their name in the First Name, Middle Initial and Last Name fields if the individual is not Faculty at The University of Alabama

   **Important Note:** If you select a collaborator from the People at The University of Alabama drop down selection this will link the publication records.
3. To change the order of authorship click on the arrow up/down buttons located on the far right.

   **Important Notes:**
   a. When adding a publication, the faculty account owner (the individual entering in the information) will automatically show up as the first author.
   b. Both the Role of the author and the peer-reviewed/non-peer-reviewed fields are required.
Report Generation

Faculty have the ability to produce a number of pre-built reports based on the information entered into Activity Insight. Faculty can create a CV, discipline-specific reports, and potentially other reports depending on what College you are in and your security role in the system. To run one of the pre-built reports:

1. Select Run Reports from the left hand Navigation Menu

2. From the report screen, select the report you would like to run

   Important Note: Not all available reports are shown in the above examples. Nor will all faculty have all above reports depending on security role and college.

3. 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.
4. Once you have entered in the requested information in the report steps click on Run Report.

**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”.

**Quick Tips**
Below are a few tips on beneficial features provided by Digital Measures for the purposes of streamlining information and providing a positive user experience.

**Faculty Delegates**
Faculty are permitted to assign another individual within the University system as one to one delegates in Activity Insight. This allows individuals who are assigned by a faculty member the ability to enter activities in 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 your college representative.

**Author Reordering**
The Publications, Other Funded Projects, Exhibits and Performances and Presentations screens by default sets the faculty member who enters the citation as 1st Contributor. To edit the order of authors you may use the ‘move’ up and ‘move’ down arrows located at the right of each author entry section of the
Important Note: Only the owner of the record can reorder contributors on an entry. If the data has been imported from another UA system you will not be able to adjust the order of contributors.

Author Deletion
To remove a contributor from an entry select the garbage bin located at the far right by each author entry.

Important Note: Only the owner of the record can delete contributors from an entry. If the data has been imported from another UA system you will not be able to delete contributors.

Expanding Text Boxes
Some text boxes within the system are expandable, which is useful if you are entering lengthy text information. To expand a text box (if available) you will see two diagonal lines in the bottom right corner. By clicking and dragging this icon it will increase the area of the text box. To minimize the text area after you have expanded it, click the icon and drag the box back to the original size.
Keyword Search
At the top of the Manage Activities main screen and any screen that has a summary screen, there is a Keyword Search function available. This function allows you to search your entries based on keywords. Which means it will find all activities/items that contain the word you search on. This tool is helpful in the event you need to find an item quickly but are uncertain where the entry is located.

Rapid Reports
The Rapid Reports feature provides a way for you to run reports on your 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 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 the fields shown.

Once you have entered the requested fields select **Run Report** to view the data.
PasteBoard

The PasteBoard feature allows you to copy up to 4kb (4,000 bytes) of text from another document, such as your vita in Microsoft Word, and paste it into Activity Insight. To utilize this feature, select **PasteBoard** from the left hand navigation menu under Manage Activities.

![Manage Activities](image)

The PasteBoard will appear in the lower right hand corner of your screen. You may relocate PasteBoard to any location on your screen by dragging it. Then you will simply copy text from another document and paste it into PasteBoard. Once you have pasted the desired text into PasteBoard, you can select all or parts of the text from it and drag the selected text in the appropriate field.

![PasteBoard](image)

PasteBoard will move from screen to screen as the user navigates the system, as long as no more that 4kb of text is in PasteBoard. Any text in PasteBoard upon logging out will remain in PasteBoard for future sessions.
Help

When users have questions, concerns or suggestions regarding Activity Insight, they can send a support request using the Help button located in the left hand navigation menu.

The help request screen will appear. You will complete the screen and select send. An email will be sent to the UA System Administrator for review and response.

In addition to emailing the UA Administrator, you may also:

a. Review our other User Guides and Quick Reference documents on the Academic Affairs page. [http://provost.ua.edu/activity-insight.html](http://provost.ua.edu/activity-insight.html)

b. Click on any question mark (❓) next to individual items for definitions of what is supposed to be entered.

Log Out

To log out of Activity Insight scroll over the arrow to the right of your name in the uppermost left hand corner of the page. Select Log Out and it will log you off of your current Activity Insight session.

Sessions automatically time out after 90 minutes of inactivity and you will be required to log back in.

Important Note: users will receive a warning prompt five minutes before their session times out, which will enable them to restore their session if it should remain active.

FAQs

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