



THE UNIVERSITY OF ALABAMA®

Activity Insight Faculty Quick Start Guide

Activity Insight: Faculty Quick Start Guide

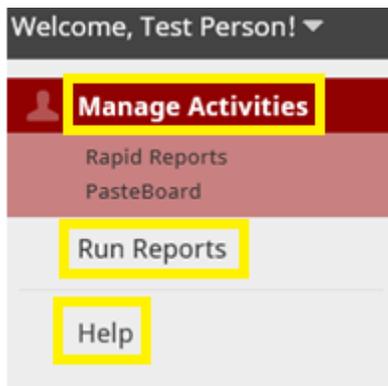
This guide is intended provide a quick overview of the system by highlighting certain aspects and features of Activity Insight. For a detailed guide please refer to the [Faculty User Guide](#).

Logging In

1. **Open** myBama in a browser.
2. **Log in** using your myBama username and password
 - a. Once logged into myBama select the **Faculty** option from the left-hand menu.
 - b. From the Faculty tab, you will see the Activity Insight icon. Click on the icon and you will be logged in to Activity Insight.

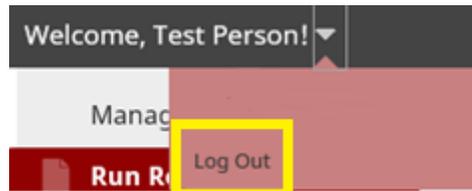
System Navigation

1. **Left-hand Navigation Menu** – Once logged in to Activity Insight you will be navigated to Activity Insights home page where you will see a left-hand menu bar.



- a. **Manage Activities (data in)** is where you will add, update and review your activities.
 1. **Rapid Reports** and **PasteBoard** will be discussed in the sections below.
- b. **Run Reports (data out)** gives you the ability to run reports based on your information in the system. Available reports include Annual Review, a formatted vita, and any other college/department-specific reports your dean, department head or director asked us to create for your use. These reports can usually be run as Word documents, html, .csv, and other formats (as may be appropriate to the data).
- c. **Help** sends a help request to the UA System Administrator.

- d. **Logoff** can be found if you scroll over the “arrow” to the right of your name in the uppermost left corner of the page. Select **Log Out** and you will be logged out of your current Activity Insight session.



- e. **Privacy Policy** (in the lower left-hand corner of the screen) provides a link to detailed information regarding how Digital Measures secures your information.

2. **Manage Your Activities** - When you log in, you will automatically end up at the Manage Activities Main Menu.

 A screenshot of a web application interface. On the left is a vertical sidebar with a dark red header containing a person icon and the text "Manage Activities". Below the header are four menu items: "Rapid Reports", "PasteBoard", "Run Reports", and "Help". The main content area on the right has a light grey background and a dark red header with the text "Review a guide to manage your activities. Show more". Below the header are four main sections, each with a downward-pointing arrow icon:

- General Information**: Includes Personal and Contact Information, Biography, Expertise and Philosophies, Administrative Data - Permanent Data | Yearly Data, Administrative Assignments, Affiliations, Awards and Honors, Consulting, Degrees, Graduate/Post-Graduate Training, Faculty Development Activities Attended, Licensures and Certifications, Media Appearances and Interviews, Professional Memberships, References, Work History, and Workload Information.
- Teaching/Mentoring**: Includes Academic Advising, Directed Student Learning (e.g., theses, dissertations), Mentoring, Non-Credit Instruction Taught, Scheduled Teaching, Student Opinions of Instruction, Clinical/Field Teaching, Teaching Innovation and Curriculum Development, CAEP Faculty Qualifications, and ASDE P-12 Experience.
- Scholarship/Research**: Includes Contracts, Fellowships, Grants and Sponsored Research, Other Funded Projects, Exhibits and Performances, Intellectual Property (e.g., patents), Presentations, Publications, and Research Activity.
- Service**: Includes Clinical, University, Professional, and Public.

- a. There are four Sections within the home page:
1. General Information
 2. Teaching/Mentoring
 3. Scholarship/Research
 4. Service

- b. We have loaded some initial administrative data from other existing UA databases. Since those come from other databases, they are not editable by faculty and can only be changed in the source database. If you see exclusions or errors with those entries, please contact the UA System Administrator at dmhelp@ua.edu.
- c. There will be some screens or fields within each screen that may be college specific. If you see items that do not apply to you individually or as a department, you may skip those screens or fields.

Data Entry Tips

1. A couple of main uses of the data in Activity Insight is to support your annual performance evaluation and promotion and tenure review. If you want your department head/chair/dean to consider an activity in your review, you should include it in your Activity Insight profile.
2. Some data elements will be used by your department, college or university wide for professional accreditation and other reporting purposes. The more data you enter in Activity Insight, the fewer requests you will receive for additional data.
3. In most cases, the drop-down menus on the screens will guide where an activity goes; however, if you have questions regarding where certain information goes, please ask your department head/chair/dean where they would look for the information.
4. Please remember that the output is only as good as the input. Therefore, the quality and extensiveness of reports run (by you, your department, college, or the university) is based on the extensiveness of the data that you enter in your profile.
5. **Date ranges drive most reports**, so it is very important to at least enter the year for each activity.
 - a. If you can't remember the exact date(s) of an activity, do not obsess over it or spend significant time trying to track it down. The year of the activity is of primary importance. If you remember the month, please add that from the drop down too.
 - b. Ongoing activities with a known end date should include both a start date and end date (with the end date a future date). Otherwise, ongoing activities without a known end date should include a start date with no end date.
 - c. One day activities should include an end date with no start date.

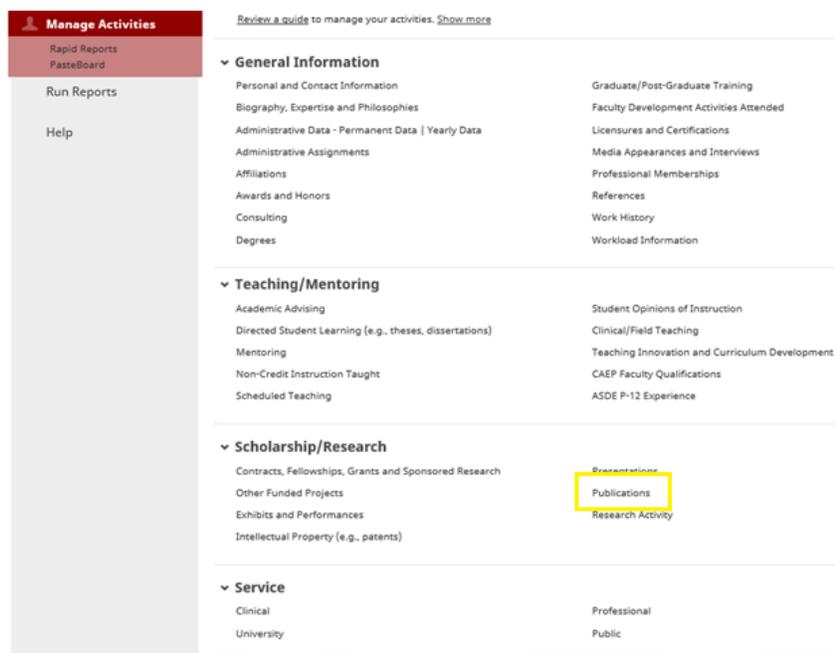
Screen Specific Information

1. To access any screen, click on its name from the Manage Activities Menu page.
2. For a definition of each screen you may reference our [Screen Summary Reference Guide](#) which will explain each individual screen and the data input into that screen.
3. Where data is pre-populated from university sources, corrections may only be made in the source data, not directly by the user in Activity Insight. To make corrections to pre-populated data you may contact your UA System Administrator at dmhelp@ua.edu. We suggest you review all screens/fields to ensure the correct data is provided.

The following screens have partial or full pre-populated screens:

- a. Personal and Contact Information
- b. Permanent Data & Yearly Data
- c. Administrative Assignments
- d. Degrees
- e. Workload Information
- f. Scheduled Teaching
- g. Student Opinions of Instruction
- h. CAEP Faculty Qualifications (Education only)
- i. Contracts, Fellowships, Grants and Sponsored Research
- j. Intellectual Property

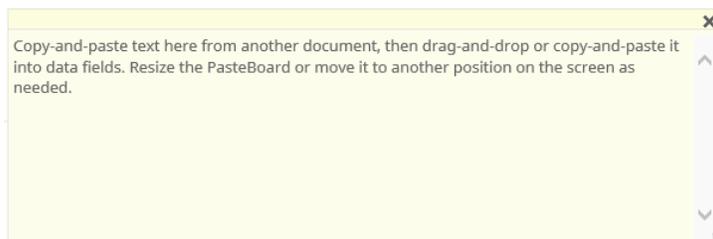
4. **Publications Screen** - There are several methods that can be used to get citation information into the Publications screen. Below will briefly discuss the methods. For detailed information on how to import publications from supported web databases please refer to the [Import Publications Reference Guide](#).



- a. **Manual Entry** - You can enter citation data by typing it in the fields within the publications screen. However, we recommended you explore the other options below before using this option.
- b. **PasteBoard** - You may use the **Pasteboard** option located under Manage Activities in the left menu bar.



1. PasteBoard feature allows you to drag and drop text within Activity Insight rather than switching between your CV and Activity Insight.
2. Clicking on the PasteBoard tab in the left-hand menu will open a window/tool in the lower right hand corner of the window. This will allow you to copy and paste text from another application such as MS Word and drag and drop text from PasteBoard into various fields.



- c. **Import Publications** - You 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 screen.



There is a good chance that citations of your publications are already stored in, or can be compiled by another software system such as a reference manager or database. These software systems enable you to pick records and then export them into a BibTeX file. Activity Insight allows you to upload that BibTeX file so that you do not need to rekey those citations.

< Import Publications

Your publications may exist in other systems—and we want to make adding them easy. Import your citations using one of the options below, then follow the prompts to address duplicates, match collaborators, and perform a final review to complete the process.

Import from a BibTeX file

Import publications from other software or databases such as:

- EndNote
- Google Scholar
- Mendeley
- RefWorks
- Web of Science
- Zotero

Choose File...

Import from a Third Party

Select a service:

- Scopus Crossref PubMed

Search criteria:

Author Name

Publication Year to

[Add search criteria](#)

Search Scopus >

You will find details on how to import publication information from other software systems into a BibTeX file in our [Import Publications Reference Guide](#).

- d. **Coauthor Entry** - Activity Insight is a relational database meaning anyone who collaborated with you on publications can enter in the publication and as long as they add you as a contributing author, the publication will also appear in your activities. If multiple UA Activity Insight users authored an article, there will (should) be only one record of the citation data in Activity Insight, but it will be associated with all of the authors. The first author to enter a citation will create the citation record for the other UA authors. If you see a record in your list of Publications that says, "Entered By: *Faculty Name*", then a coauthor has already created the record. Please do not create a duplicate record.



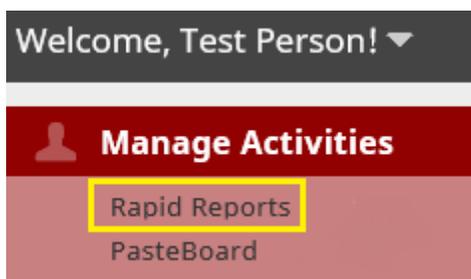
If any of the information entered by your coauthor is incorrect, please work with that individual to correct it. Generally speaking, we subscribe to the idea that the first (or closest to the first) author should be the record owner.

5. **Grants and Contracts** that have been applied for through the Office of Sponsored Programs (OSP) Proposal are uploaded for you and you will not be able to make edits to this screen. As with Publications, those with multiple PIs or Co-PIs, have one record shared across multiple UA faculty. Any awards that do not go through OSP should be manually entered in **Other Funded Projects** Screen.

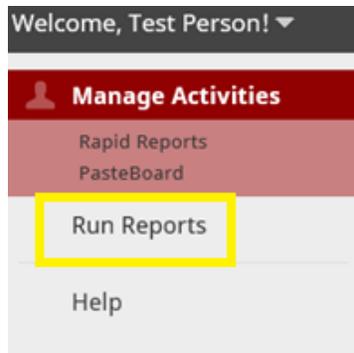
If you believe a grant should be on your list, and it is not, you will need to contact the UA System Administrator at dmhelp@ua.edu.

Reports

1. **Rapid Reports** – is a feature that allows you to generate a sample report from Activity Insight. This will allow you to instantly see the effect of any changes you have made to your activities. To open Rapid Reports click on the **Rapid Reports** link under Manage Activities. **Rapid Reports** only runs a report for the person who is logged into Activity Insight.



2. **Run Reports** – Allows you to run custom built reports based on the information entered into Activity Insight. To run a report click on **Run Reports** in the left-hand menu.



- a. The Run Reports link is where you will find reporting capability specific to your college. You can create a CV, discipline-specific accreditation reports, and potentially other reports depending on what College you are in and your security role. Once you click on the **Run Reports** icon from the menu, you will need to select which report you would like to run.

Run Reports

Select the report you would like to view.

Report Name	Actions
AACSB Academic Qualifications Report	🔒
UA Annual Evaluation	🔒
NIH Biographical Sketch	🔒
NSF Biographical Sketch	🔒
Promotion and Tenure Vita	🔒

- b. After selecting the report you would like to run, a box with list of steps will be displayed. Simply follow the number/steps (1 – x) and select the appropriate options.

[← Run Promotion and Tenure Vita](#)
Run Report

[Download this report's template](#)

1 **Date Range**

Start Date:

End Date:

2 **File Format**

File Format:

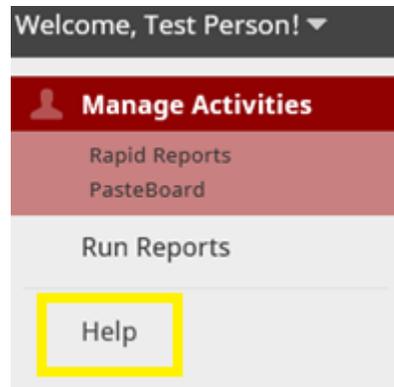
Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size:

- c. Most of the reports are **date defined**. In other words, the person running the report defines the time frame for the data elements being pulled into the report. This presents some issues where activities have been added that do not have dates associated with them. If you run a report and see undated items, please go back to the record (or if it is someone else's record, ask them to) and add a date to it.
- d. Department heads, directors, and deans can run reports on the faculty activity within their departments, schools, or colleges.
- e. You can generally export reports as MS Word, pdf, html, and/or .csv/Excel files. They are editable in related software packages.

Help

1. You may always email the UA System Administrator at dmhelp@ua.edu, by clicking the **Help** link on the left-hand menu if you have any questions, concerns or suggestions.



In addition to emailing the UA Administrator, a few other locations we would like to suggest that may also provide assistance.

- a. Review our other User Guide and Quick Reference documents on the Academic Affairs page. <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.
- c. Visit the Activity Insight User Guide at <https://www.digitalmeasures.com/activity-insight/docs/guide.html>