THE UNIVERSITY OF ALABAMA®

Activity Insight

Report Generation Guide

DigitalMeasures

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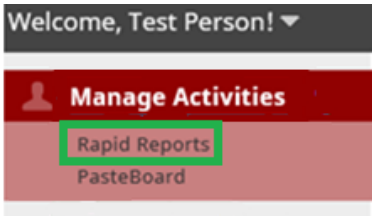
Overview of Reporting

Activity Insight allows users to generate a number of pre-built reports based on the information entered into the system. Administrators, depending on their permission level, can also run custom reports and create new reports based on the information in Activity Insight for the departments/college they are assigned to. This quick guide will discuss all reporting options mentioned above.

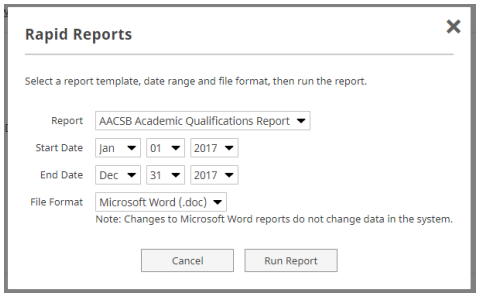
Rapid Reports

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.

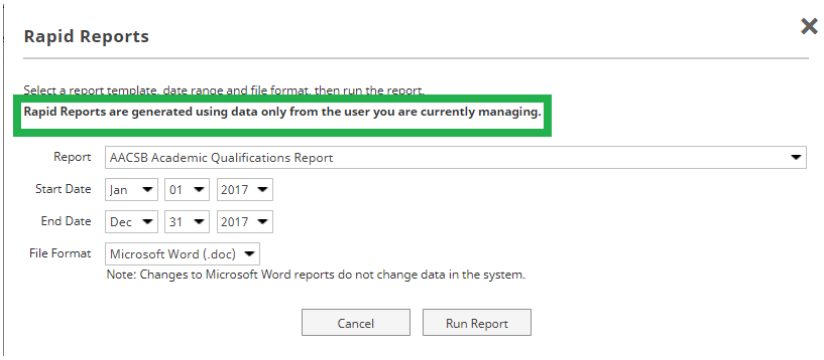
To access this feature select **Rapid Reports** under the Manage Activities menu.



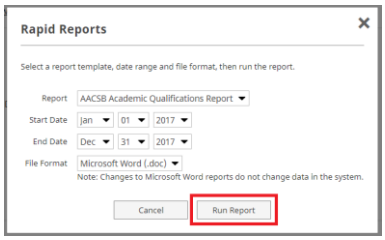
You will then be able to select the report you would like to run, the date range and the format of the output by entering in the fields shown.



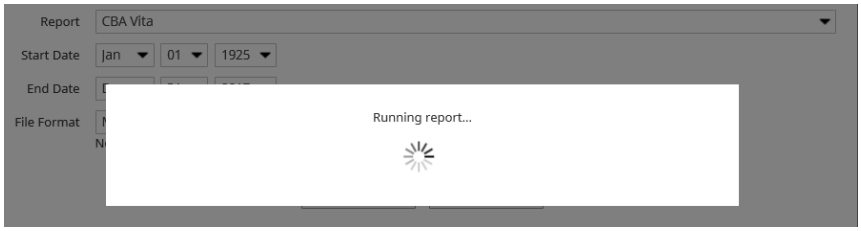
***Important Note**: If you are an Administrator/Reviewer managing data for another faculty member and try to run Rapid Reports, the report box will notate the report being run will only be using data for the user you are currently managing.*



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



The system will search the information in the database, based on the options you selected in the report box and generate a report.



Depending on the browser you are using, the report will show up at the bottom of the screen in a box and allow you to open or save it for viewing.

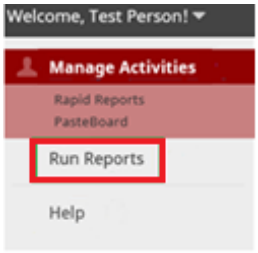
Google

Internet Explorer

Report Generation – Faculty

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:

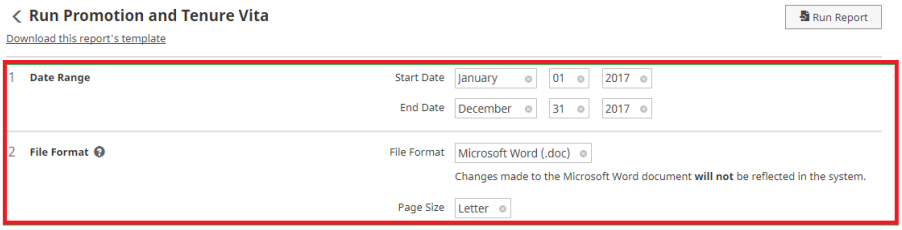
Select Run Reports from the left hand Navigation Menu



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

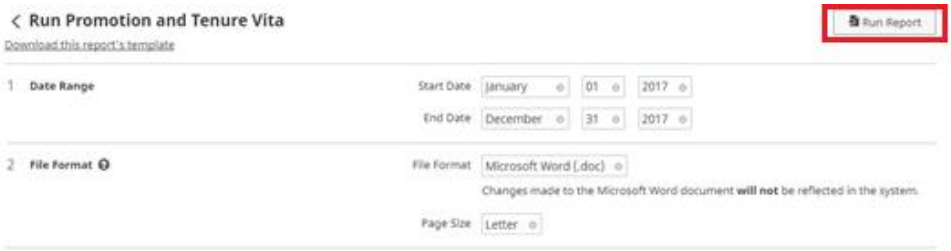
Important Note: *Not all available reports are shown in the above examples. Nor will all faculty have all above reports depending on security role and college.*

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.

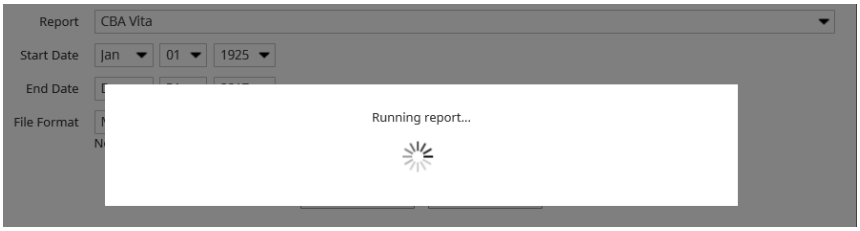


Important Note: *Most of the reports are date defined which means it is very important for any activity you enter in the system to have at least a year associated with it.*

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



The system will search the information in the database, based on the options you selected in the report box and generate a report.

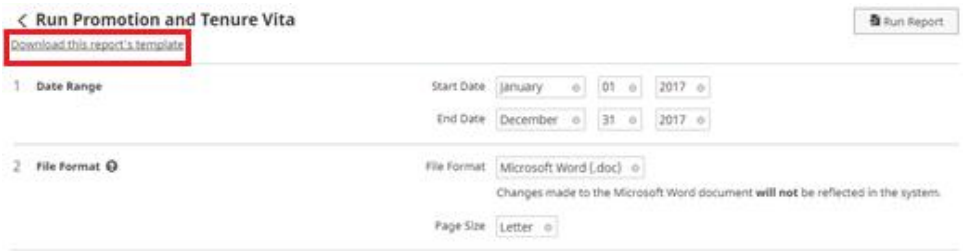


Depending on the browser you are using, the report will show up at the bottom of the screen in a box and allow you to open or save it for viewing.

Google

Internet Explorer

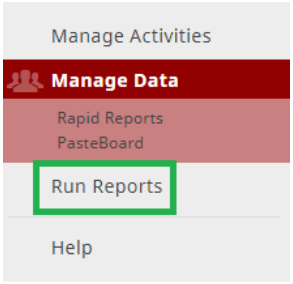
Important Note: *If you feel data is missing from your report, sometimes it is helpful to see how the report is built and what screens/fields are pulling into the report. You may download a report's logic template showing how the report you selected is built by selecting "Download this report's template".*



Report Generation – Administrator/Reviewer

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.

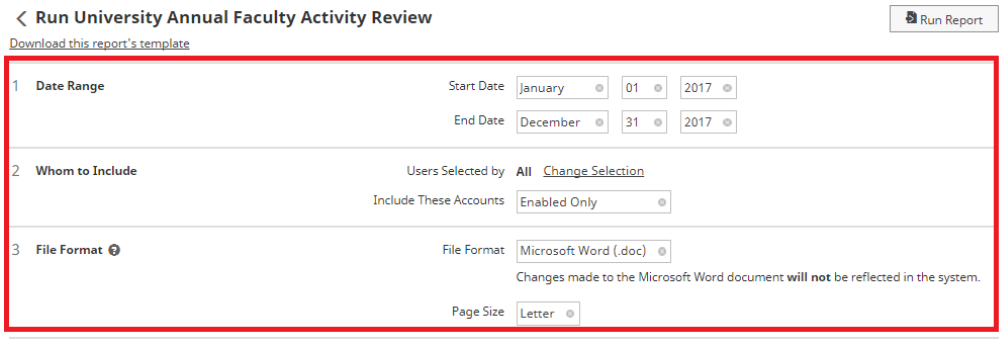
To Run Reports, select **Run Reports** from the left hand Navigation Menu.



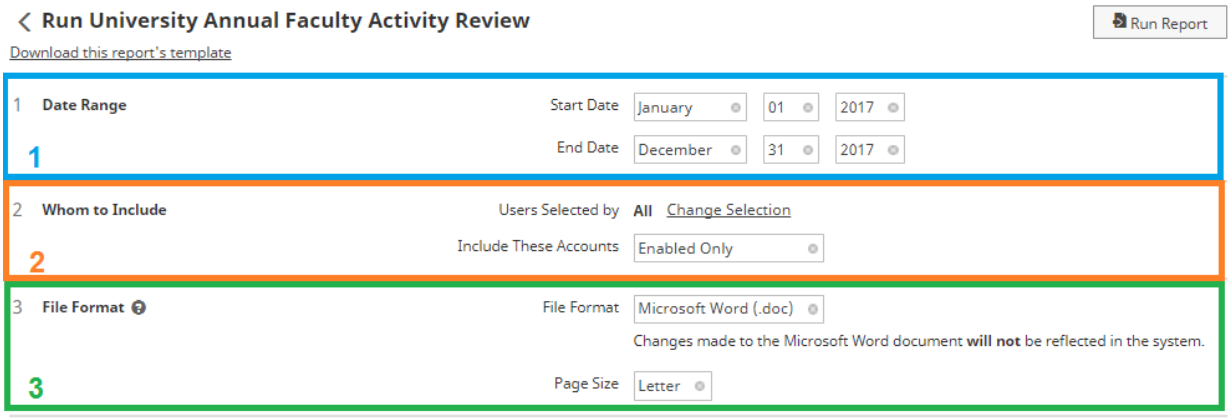
This will navigate you to the report screen that will list all the available reports in the system. Select the type of report you wish to run from this page (scroll up and down).

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.



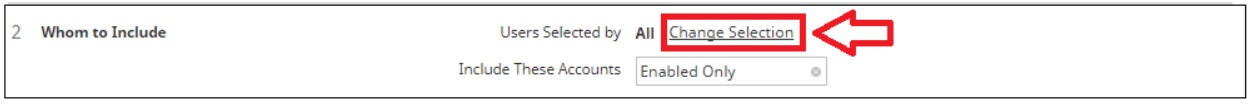
Important Note: *Most of the reports are date defined which means it is very important for any activity you enter in the system to have at least a year associated with it.*



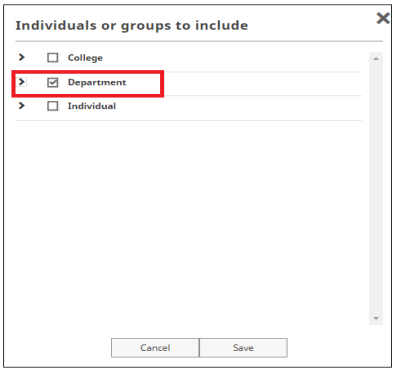
1. **Date Range**: specify a *Start Date* and *End Date* for the report to retrieve results within certain time periods (e.g. one year, multiple years, *x* amount of months)

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).

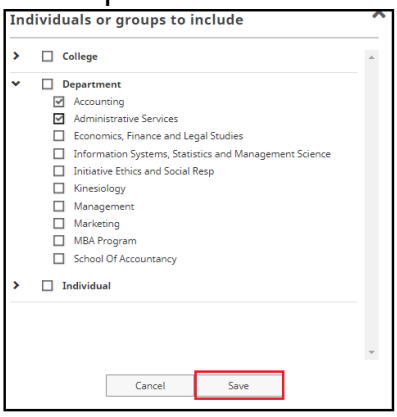
    a. To select certain individuals, or an entire group, click on the **Change Selection** link in step 2.



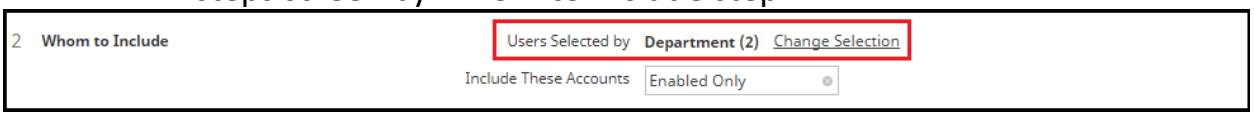
    b. To include certain groups such as particular departments click on **Department** to expand your department options (based on your assigned administrative reviewer role**.**



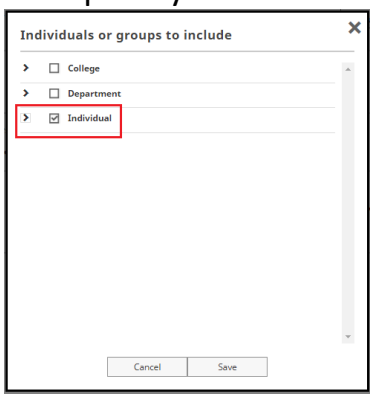
c. Select the appropriate department(s) you would like to narrow the report down to from the list provided and click **Save**.



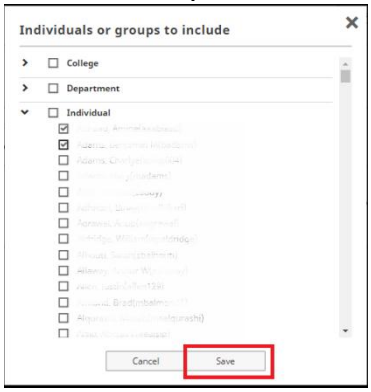
d. The new selected number of departments will show up on the report steps screen by **Whom to Include** step.



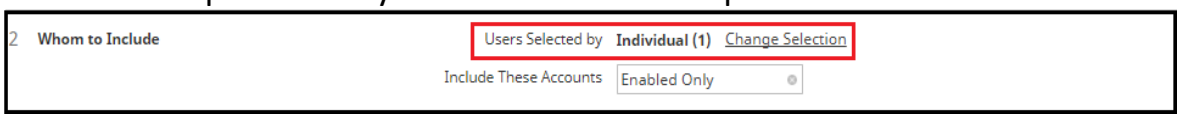
e. To include specific individuals, click on the **Individual** under the change selection option to expand your individual options.



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

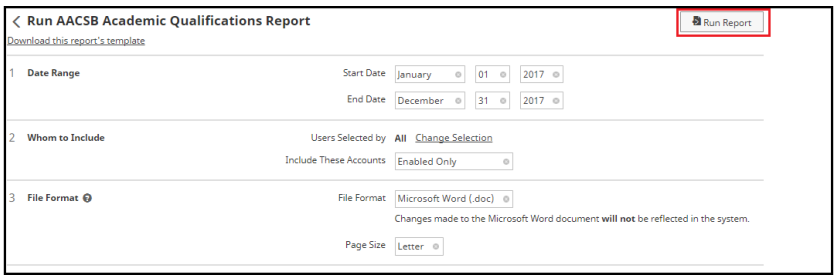


g. The newly selected number of individuals will show up on the report steps screen by **Whom to Include** step.

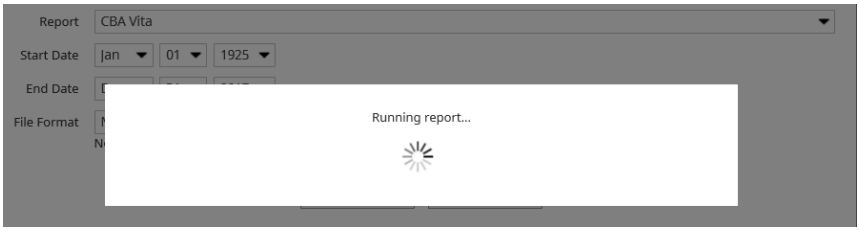


3. **File Format:** choose your output file format (MS Word, PDF, etc.) and page size (Letter, A4) under this reporting option.

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



The system will search the information in the database, based on the options you selected in the report box and generate a report.



Depending on the browser you are using, the report will show up at the bottom of the screen in a box and allow you to open or save it for viewing.

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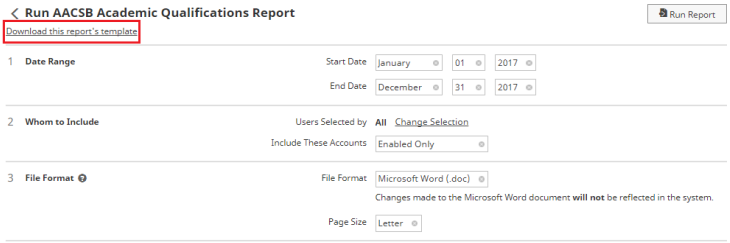
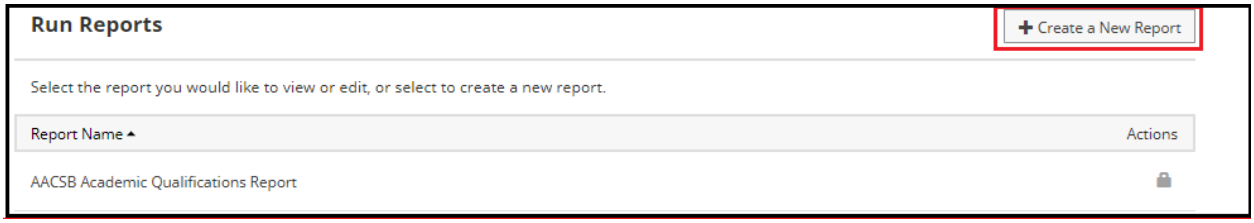
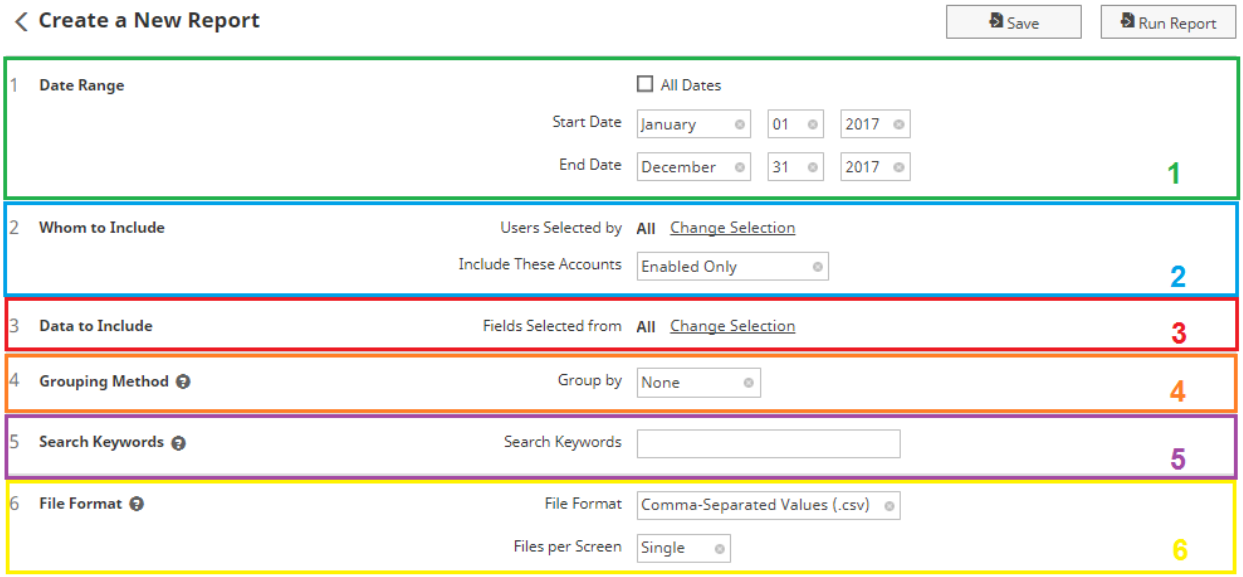


Creating a New Report – Administrative/Reviewer

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.

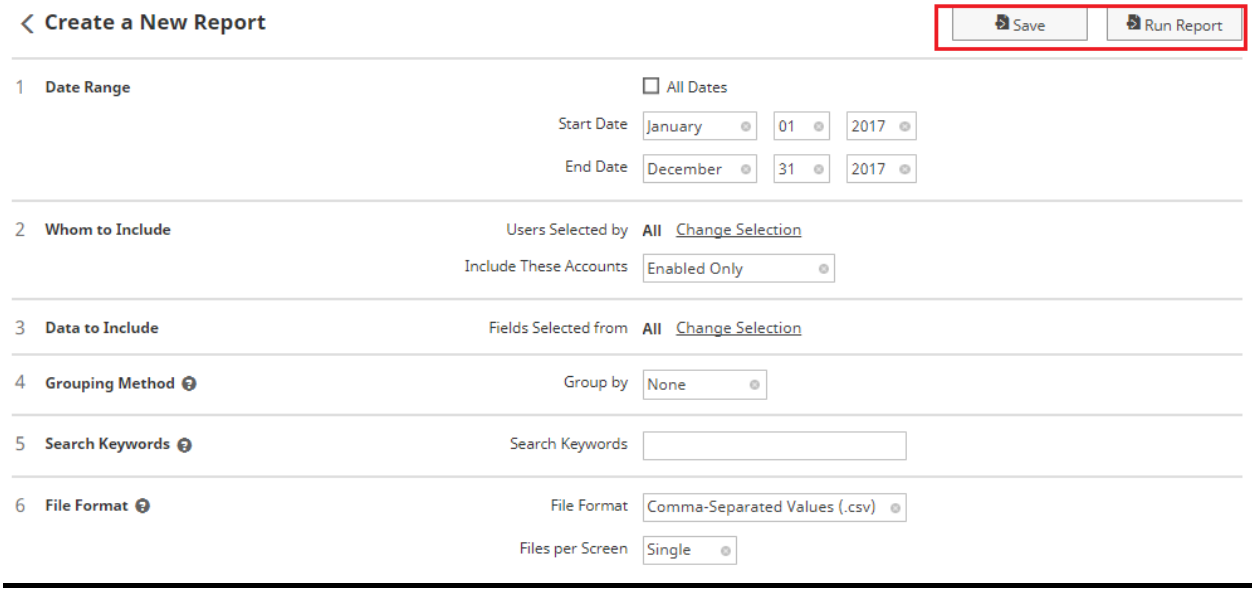


After selecting **Create a New Report**, a box with list of steps will be displayed. Follow the number of steps entering in the information for each step.



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 the report.

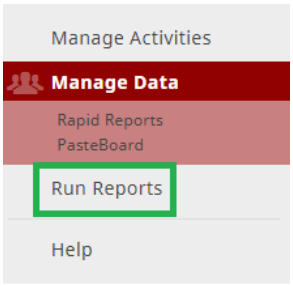
Once you have completed setting up the reporting options, click on the **Run Report** to create the file **OR** click on **Save** to save the report in your report list for the future.



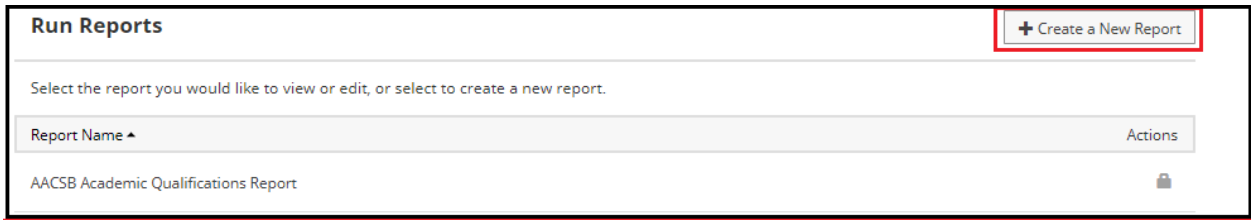
Saving a Report – Administrator/Reviewer

Activity Insight provides users with the role of Administrators the ability to save Newly Created Reports for future use. This tool is beneficial when you find yourself frequently using the **Create a New Report** option in the Run Reports section to create the same report over and over for regular use. This feature will allow you to save the selected criteria and the report to make running the report simpler and quicker in the future.

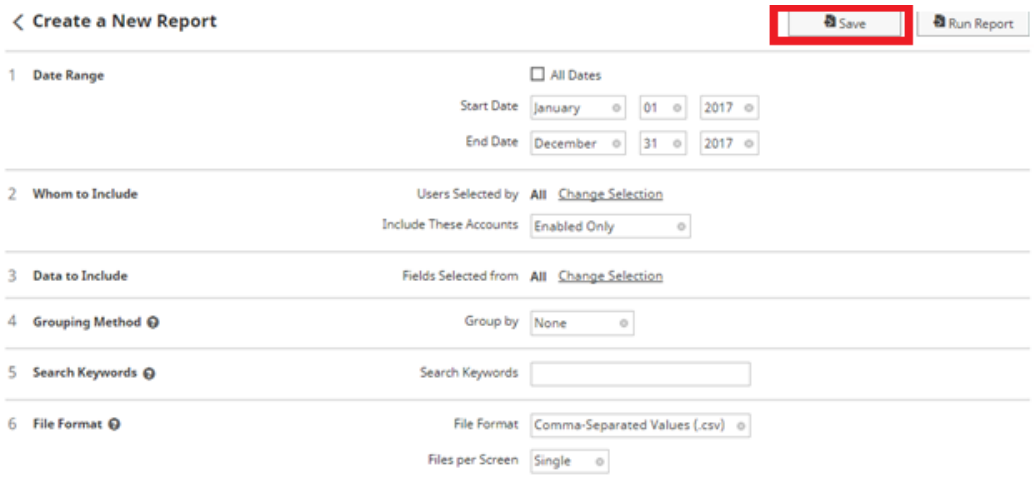
To save a report you must first select **Run Reports** from the left hand navigation menu.



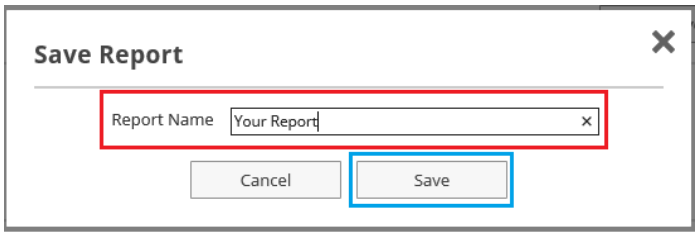
Click **Create a New Report** in the upper right hand corner of the report selection screen.



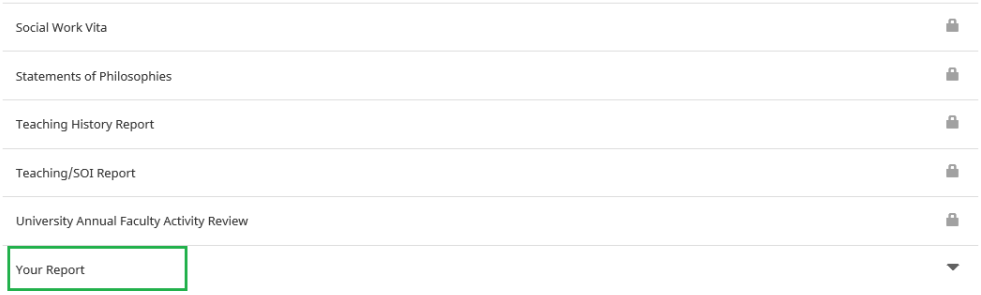
Complete the report criteria screen and select **Save** at the top of the page.



Name your report in the **Report Name** field in the "Save Report" pop up window and select **Save.**



Your saved report will appear in the **Reports** list along with all the other pre-built reports in the system.



Important Notes:

- *To change the criteria of your saved report, select the report from the report list, change any of the report criteria and select the **Save** button.*
- *All saved reports must have a unique name. If you attempt to save a report with a name currently in use you will receive an error message and must choose another name for your report.*