DigitalMeasures

ActivityInsight Administrator's Guide

Updated July 2012

ActivityInsight

Showcase your faculty.

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Chapter 1: Introduction

Welcome to ActivityInsight!

Digital Measures Activity Insight is a fully customizable online information management system designed to organize and report on your users' teaching, research, and service activities. Activity Insight is used by hundreds of campuses in more than twenty-five countries to manage critical information for accreditation and personnel management. It provides the most reliable, versatile, and secure solution for generating custom reports easily and in real time.

Activity Insight eliminates the time-consuming and often tedious task of gathering and compiling data to build reports, saving your campus time and effort by eliminating the need to manually prepare users' activity reports. From customized report generation for accreditation and campus stakeholders, to keeping users' profiles current on your campus' external website, Activity Insight enables your campus to focus on using reports instead of preparing them.

Once data are entered into Activity Insight, reports can be generated immediately by anyone to whom you give access. Reports can be prepared in most formats and configurations necessary. Activity Insight can be accessed at any time, day or night, from anywhere you have an Internet connection.

Benefits to Users

Activity Insight eliminates periodic, recurring requests for information on users' teaching, research, and service activities. Reports for personnel review procedures, such as promotion and tenure, or reports for other stakeholders, such as faculty rosters and vita, can all be generated once activity data have been entered in Activity Insight. It provides a single convenient place for users to maintain their activity data, and can be accessed easily to generate these reports. You can also link Activity Insight to your campus's website, ensuring that profiles of your users are always current.

Benefits to Administrators

Administrators need timely access to users' activity reports for accreditation; your state institutional research surveys; personnel review procedures, such as promotion and tenure; program reviews; and other stakeholders. Activity Insight gives administrators an efficient, centralized, easy-to-navigate source for generating reports on these data. With Activity Insight, administrators are more aware of their users' activities and are, thus, better positioned to publicize their accomplishments.

About DigitalMeasures

Digital Measures makes web-based software for higher education. The company was founded in 1999 with the implementation of an online course evaluation system within the University of Wisconsin (UW) System. Word quickly spread to other UW System campuses, then to schools across the United States. Today, Digital Measures flagship solutions are trusted by more than 1,500 campuses in more than twenty-five countries. The intention of these solutions is to make it easy to collect information from a broad base of people so powerful reports can be generated. Each Digital Measures solution perfectly fills the need for which it was designed; they can be tweaked and tailored to meet your exact needs.

Digital Measures aggressive growth is fueled by one simple fact: clients are the company's singular focus. Each solution developed is fully customized to meet that client's needs, and user feedback is constantly utilized to improve functionality and drive development.

In addition, Digital Measures solutions are:

- Cost effective
- Enterprise-grade and highly scalable
- Web-based and compatible with most current web browsers
- Section 508 of the Rehabilitation Act compliant
- Family Educational Rights and Privacy Act (FERPA) compliant.

Section 508 of the Rehabilitation Act Compliant

Digital Measures solutions are compliant with the Rehabilitation Act's Section 508 to make them easy to use for individuals with disabilities. Feedback has been received from users across the company's client base noting that Digital Measures solutions work well with screen readers. Here are two examples of the steps taken to ensure compliance and accessibility:

- Inside Activity Insight, text can be aligned above or to the left of a data entry field. If an individual is visually impaired, she would not necessarily be able to see the "connection" between text and the input field that should be used to enter data for it. To facilitate this connection, Digital Measures software has labels that are not visible on the screen but that are read by screen readers, to tie these items together. This enables screen readers to provide the connection between text on the screen and the data entry fields.

- Steps have been taken to ensure a screen will not refresh to change its content or display without the user specifically triggering it. If a screen refreshed, individuals who are visually impaired might not know that this has occurred. An example of this is on the **Run Custom Reports** screen. As selecting a report can change the parameters and options that are available, Digital Measures has configured the screen to require users press **Select Report** before the screen refreshes.

FERPA Compliant

Digital Measures abides by all applicable regulations in FERPA, protecting the privacy of student data provided by clients. This means the company will not transmit, share, or disclose any data about a student, except to other school officials who need the information within the context of their professionally assigned responsibilities.

Database Type, Servers and Security

Digital Measures uses Postgres as its database. However, you are not required to work with the data in this form, as the data are stored in a quite complex schema to accommodate the customizations that are made for each client. When you are working with your data, you can download it in comma-delimited files or work with it using **Web Services**. In either case, this provides you full access to all of your data at any time, in a simplified view that makes it easier to work with and utilize.

The following security measures are in place for Digital Measures servers and datacenters:

- All data are transferred over an SSL-encrypted connection.
- Server rooms are locked, caged, and protected by armed security guards present at all times.
- Servers are firewalled and located behind an intrusion detection system.
- Redundant fire suppression and climate control systems are used at all times.
- Redundant power and Internet connections are enabled.

Digital Measures also has a warm standby site always running in case a disaster takes place at the primary datacenter. If this were to happen, the company can failover to this standby site in about 15 minutes to a read-only version of Activity Insight, losing no more than five minutes worth of data. During this period, the determination will be made as to whether service will be restored to the primary datacenter or whether the standby datacenter will become the interim primary datacenter. In the first case, full read-write service will be restored to your data and no data will have been lost. In the latter case, read-write service will be instituted, losing five minutes or less of data, as this is the synchronization delay between the primary and standby datacenters' servers.

In addition to these server security measures, Digital Measures also performs secure nightly backups to five geographically dispersed locations. In addition to these backups, you are able to download a full copy of all your data at any time, as often as you like; you can even put a secure process in place to do this on an automated basis.

Activity Insight is compatible with most modern browsers including Internet Explorer, Mozilla Firefox and Apple Safari.

Warning: Digital Measures does not currently support the use of frames for its websites. Using a frame may cause users to not be able to see the full screen.

Note: Many clients have found that Internet Explorer does not process as quickly as other browsers, such as Firefox. In addition, it is strongly recommended that all users of Activity Insight keep their browsers and operating systems as up-to-date as possible to maximize performance.

Privacy Statement

Digital Measures takes the privacy of its clients and their users seriously. The company's privacy statement, available by accessing the **Privacy Statement** from the Left-Hand Menu in Activity Insight, details the steps that are taken to keep your data safe and secure.

About This Guide

This guide provides Administrators with the information they need to implement and administer Activity Insight for their campus. It is designed to be an administrator-level guide to the project launch, customization, and administration. It is assumed that Administrators have the following knowledge, skills, and abilities:

- Understand how to use the Internet
- Know the types of information that are stored in your current campus systems
- Can work with data in Microsoft Excel or another spreadsheet application
- Have a high-level understanding of relational databases
- Know the internal policies, dynamics and realities of your campus

Strong technical knowledge of web applications or programming is not required. However, some technical understanding of your current systems will be helpful. For more information on the role and responsibilities of the Administrator of Activity Insight, see the section below on The **Activity**Insight University Administrator.

A printed copy of this guide was provided to your campus during the sign-on process. If additional printed copies are desired, these can be ordered through the **Dashboard** utility by selecting the **Order Printed Copies** link.

Suggestions and comments regarding this guide are encouraged and should be submitted to comments@digitalmeasures.com.

This guide is updated as enhancements to Activity Insight are released. The most recent version of the guide is always available here:

https://digitalmeasures.com/aiguide

Additional Resources

There are several additional documents you may find helpful as you implement and maintain Activity Insight. They were included as links in your Getting Started email, and are also available in the **Resource Center** within Activity Insight.

- **Keys to a Successful Implementation of Activity Insight**
  Review this document to understand best practices other clients have used to increase the success of the introduction and usage of Activity Insight at their campuses. These keys represent the most important considerations to make as you guide the task of implementing Activity Insight.
- **Sample Implementation Plan**
  Fill in the Sample Implementation Plan and accompanying Project Outline to reflect the goals and timeline for your implementation of Activity Insight. This document can serve as a reference for you, your project team, and your Client Manager to keep things on schedule and ensure everyone is on the same page.
- **Data Entry Review Instructions (for Faculty)**
  One of the keys to successfully implementing Activity Insight is to make it easy for faculty to keep their data up to date. One of the best ways to do this is to import data on their behalf. Use these instructions as a reference as you answer the question of how to get your faculty's data into Activity Insight. Then, provide this step-by-step guide to faculty so they can ensure their data are correct.

If you have questions regarding these additional resources, please contact your Digital Measures Client Manager.

The ActivityInsight University Administrator

The Activity Insight University Administrator will administer Activity Insight and be the liaison between your campus and Digital Measures. He or she will lead your implementation and perform a variety of ongoing administrative tasks, such as specifying what customizations Digital Measures should make to your instance of Activity Insight and assigning permissions and security roles. This person may designate others to perform limited administrative functions within Activity Insight.

Having the right person as your University Administrator is important in ensuring a smooth launch of Activity Insight. The time and political skills required of your Administrator depend on whether you are implementing Activity Insight for your entire campus or just for one unit. The Administrator will:

- Steer the setup, customization, and launch of Activity Insight
- Bring together the necessary technical and human resources
- Coordinate testing of your customized Activity Insight with pilot groups
- Set and manage launch timelines
- Provide overall direction on the setup of Activity Insight for your campus

It is important that your Digital Measures Administrator have the skills necessary to manage a project from implementation through launch, and then coordinate maintenance efforts for the solution. The ability to communicate technical concepts to the rest of the project team and other stakeholders in the project is beneficial. The better your Administrator is able to keep a project team communicating, organized, and moving the project forward, the better your overall implementation and long-term use of Activity Insight will be.

Specific Activity Insight permissions accompany the role of University Administrator. For more information about the role through which the Activity Insight University Administrator receives his or her permissions, see *Chapter 4: Managing Security Roles*.

Requirements

While the Administrator role will not require immense technical background or training, it will require these skills:

- A basic understanding of data structures, such as database tables and primary keys
- The ability to obtain and manipulate data files that include information, such as the current class schedule, so the data can be imported into Activity Insight
- The ability to work with groups from across the campus in a fruitful manner
- The ability to pass technical documentation to technically oriented individuals on your campus so they can put the more complex features of Activity Insight in place
- The ability to speak about the various aspects of implementing and using Activity Insight in a way that resonates with the various stakeholder groups at your campus

Time Required

The amount of time that your University Administrator will need to devote to launching Activity Insight will depend on several factors, including the size of your campus, number of testing sessions, and the level of support from your campus's technical staff. Your University Administrator's day-to-day involvement will drop off significantly after the launch and will continue to decrease to only a small part of his or her total duties after Activity Insight is in place.

> **Note:** On average, it takes three to six months to fully implement Activity Insight. This includes a good amount of screen and report customization, implementation of the advanced features, pilot testing, and data imports to create a good starting point for faculty, Of course this estimate is heavily influenced by the implementation decisions made and the amount of time your campus can invest.

Unit Administrators

In addition to your Activity Insight University Administrator, it is recommended that you invite each of the colleges/schools/departments/divisions at your campus to appoint a liaison to advocate the data collection and reporting needs of their unit. This person should have the same skills as the University Administrator.

Setting Up ActivityInsight for a Single College

If you are implementing Activity Insight for a single unit on your campus, you will appoint a College Administrator instead of a University Administrator. The role of your Activity Insight College Administrator will closely mirror the role of the Activity Insight University Administrator. However, the amount of time required to successfully launch Activity Insight will be significantly less than that required for a campus-wide launch.

Choosing Your Configuration

When multiple units on a campus work with Activity Insight, you will need to decide whether they will be set up with one or separate instruments. This section will help you decide which configuration best meets your campus's needs. While this decision can be nuanced and time-consuming to consider, a good decision up front is important.

Choosing the Right Configuration

There is one question that can answer whether it is best to proceed with one or multiple instruments: *Will your units be in agreement and willing to work together with regard to data collected campus-wide?* If so, then a single campus instrument is the correct choice. This is the most common and recommended configuration, as it enables a specific, campus-wide dataset to be collected. If your units are not in agreement or are not willing to work together, then separate instruments are the correct choice –one for each of your units.

If after considering this question you are unsure as to the right decision, then the following list of pros and cons should help. Please contact your Digital Measures Client Manager for further consultation in making this decision.

Configuration Options

Single Campus Instrument

Using a single instrument ensures that a specific campus-wide dataset is collected. Additional screens and fields can be added to customize the instrument for each unit. However, these customizations must be routed through your University Administrator for approval.

Pros

- Consistent data collection and reporting at the campus level while still enabling screens and fields to be added to the instrument for specific units with some limitations.
- Simplified data integration. Imported data do not need to be segregated by unit. Exported data do not need to be combined to create campus-wide reports.
- Most convenient configuration for users with cross-unit appointments. Users with cross-unit appointments can enter the unit-specific data requested by each unit with which they are associated.

Cons

- For fields collected campus-wide, the units must be in complete agreement as there cannot be different versions of the same field. Enabling units to create multiple versions of the same field would cause ambiguity in reporting and confusion for users with cross-unit appointments.

- Central administration of Activity Insight is *required* to act as a "clearinghouse" for customizations.
- Unit Administrators do not have the ability to submit **Work Requests** until after implementation is complete. A work request is the formal method for initiating work to be completed on your behalf by Digital Measures.
- **Editable User Reference** works only for forms without unit-specific customizations. For more information, see "Editable User Reference" in *Chapter 6: Customizing Screens and Fields*.
- Only one **Mirrored Files** setup can be in place per instrument. **Mirrored Files** enables you to use the files your users store in Activity Insight in additional ways. For more information, see "Mirrored Files" in *Chapter 10: Additional Features.*

Single Campus Instrument (only primary unit customizations visible)

Using a single instrument ensures that a specific campus-wide dataset is collected. Additional screens and fields can be added to customize the instrument for each unit. However, the user may only view unit-specific customizations of their primary unit.

Pros

- Screens, fields and reports can be customized for specific units, with few limitations.
- More convenient configuration for users with cross-unit appointments than having separate instruments for each unit.

Cons

- Less convenient configuration for users with cross-unit appointments than having a single instrument configured so that all unit-specific customizations are visible. Users with cross-unit appointments will only be able to enter the unit-specific data requested by the primary unit with which they are associated.
- Central administration of Activity Insight is *required* to act as a "clearinghouse" for customizations.
- Only one **Mirrored Files** setup can be in place per instrument. **Mirrored Files** enables you to use the files your users store in Activity Insight in additional ways. For more information, see "Mirrored Files" in *Chapter 10: Additional Features*.
- **Editable User Reference** works only for screens without unit-specific customizations. For more information, see "Editable User Reference" in *Chapter 6: Customizing Screens and Fields*.

Separate Instruments

Using separate instruments gives each of your units complete autonomy in what is collected within Activity Insight; each of your units is essentially a separate client of Digital Measures and they are not required to retain campus-wide screens and fields. They can each start with a campus-wide data set, but each could then diverge as they desire, either intentionally or unintentionally.

Separate instruments can be useful for decentralized campuses, where central oversight of the data collected within Activity Insight is neither required nor desired. Specific people can be given access to run reports for all of your units. However, a separate report will need to be run for each unit. For example, if you desire to obtain vita for your campus's entire faculty, one report would need to be run to produce vita for each of your units and these reports would then be compiled. One report cannot be run across multiple instruments. While this can make the process of running reports more tedious, it does enable each of your units to act independently in tailoring the data they collect within Activity Insight.

Pros

- Central administration of Activity Insight is not required. Each unit can administer Activity Insight themselves.
- Easier to implement and manage, as agreement between units is not required.
- Screens, fields and reports can be customized, with few limitations.
- Each unit can use their own **Mirrored Files** setup for their respective instrument. For more information, see "Mirrored Files" in *Chapter 10: Additional Features*.

Cons

- Least convenient configuration for users with cross-unit appointments, as they will need to enter their data into separate instruments for each unit with which they are associated.
- Inconsistent data collection and reporting at the campus level.
- A report cannot be run across data stored in multiple instruments.
- **User Reference** only works for users who have an account in the instrument. For more information, see "User Reference" in *Chapter 6: Customizing Screens and Fields*.
- More complex data integration. Imported data will need to be segregated by unit and mapped to multiple schemas. Exported data will need to be combined to create campus-wide reports.
- If you choose to administer Activity Insight centrally, your University Administrator will need to implement and manage multiple instruments rather than a single instrument.

Getting Help

This document provides the information that you need to launch and administer Activity Insight for your campus. The following is a list of additional resources available to you.

- The **Resource Center** provides additional documentation and a forum that enables you to connect to other Digital Measures clients to exchange ideas. For more information, see “Resource Center” in *Chapter 2: Navigating ActivityInsight*.
- The **Contact Our Helpdesk** and **Submit Your Feedback** utilities enable you to submit inquiries directly to Digital Measures helpdesk. For more information, see “Contact Our Helpdesk and Submit Your Feedback” in *Chapter 2: Navigating ActivityInsight*.
- Digital Measures technical support line: (866) 348-5677 (toll-free within the United States) available 8:00 a.m. to 5:00 p.m. (US/Central), Monday through Friday.
- Your Digital Measures **Client Manager** can provide guided tours of Activity Insight, explain features, and share advice on implementation approaches. Call or email your Client Manager anytime you need assistance. His or her contact information can be found on the **Setup** and **Dashboard** utilities within Activity Insight.

Training

Whether you are new to Activity Insight or an experienced user who needs a refresher, Digital Measures offers flexible training options for administrators. For a fee, individual users will be trained on Activity Insight through instructor-led online classes or on-site at Digital Measures headquarters.

Digital Measures can even come to you to train your administrators in private classes, for a fee.

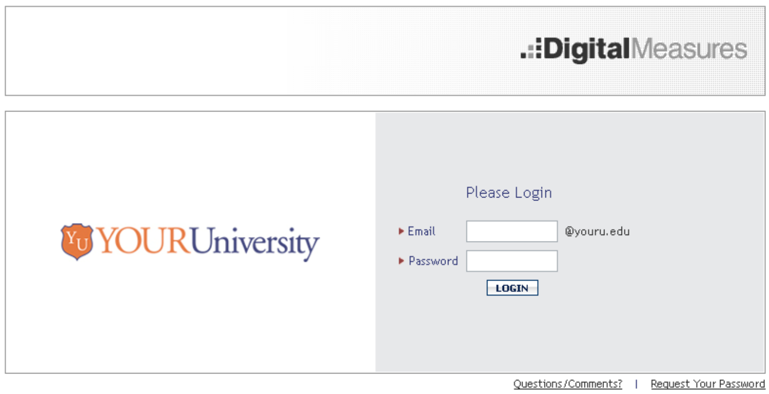
For further information regarding training, contact Digital Measures training at training@digitalmeasures.com.

> **Note:** A video and guide on how to use **Manage Your Activities** are also available on-demand to users from the **Manage Your Activities** screen.

Chapter 2: Navigating **Activity**Insight

Logging In to ActivityInsight

Once your instance of Activity Insight is in place, your Client Manager will deliver the URL you will use to log in to access your system. This URL will take you to the Digital Measures login page for your campus.



The Digital Measures login page.

As you introduce Activity Insight to users on your campus and grant them access to the system, they will use this page to log in to Activity Insight. The login page also provides links so a user can contact Digital Measures with questions and comments, and can request his or her password. Any questions or feedback submitted from the login page will be directed to Digital Measures. As part of responding to the user's inquiry Digital Measures will reach out to the University Administrator as needed.

By default, Digital Measures uses the first part of a user's email address for his or her Digital Measures username. If you choose to specify a different type of username - a NetID or employee ID number, for example - the username prompt on the login page can be updated to reflect this.

Custom instructional text can also be added to the login page. If added, this text will appear below the "Please Login" text. Of course, the logo can also be customized.

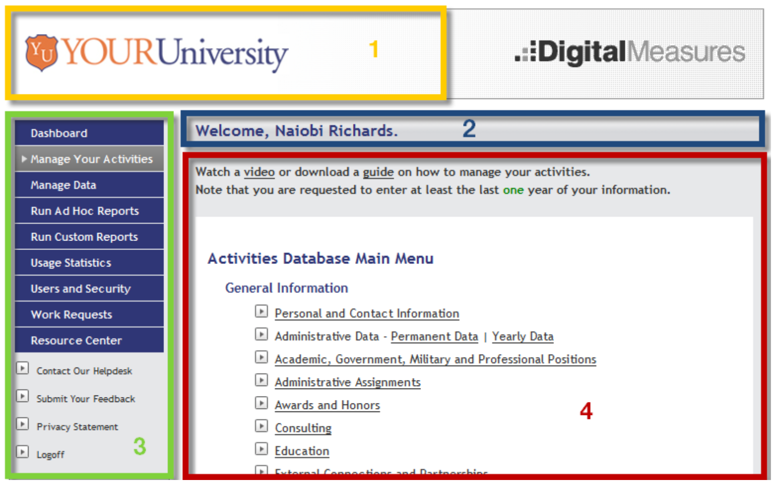
To request changes to the login page, please submit a General work request.

Note: As you customize your system, you may choose to implement a method of **Advanced Authentication**. The Digital Measures login page will remain in place and can be used in conjunction with Local Authentication and LDAP Authentication. If you choose to implement Portal Authentication or Shibboleth Authentication, however, users set up with the advanced method of authentication will need to authenticate through your campus portal or Shibboleth login page, respectively.

The **Request Your Password** link will only return passwords for users on Local Authentication, as this is the only method for which Digital Measures stores passwords.

For more information, see "Advanced Authentication" in *Chapter 10: Additional Features*.

Overview of ActivityInsight



The main parts of Activity Insight.

Activity Insight is made of many different components, all of which share common basic elements (see above).

1. Your campus's logo.
2. A personal welcome message.
3. The Left-Hand Menu for Activity Insight (described below). The background color is selected to complement your logo.
4. Main content for each utility, each of which is described briefly in this chapter.

> **Note:** If you wish to change the background color and/or logo Digital Measures selected for your institution, submit a General work request that includes the hex color code to be used and/or a JPEG file of the logo (60px high x 250px wide maximum). Please note that the Digital Measures logo cannot be removed from the banner, however.

The page a user lands on upon logging in to Activity Insight will depend on the utilities to which he or she has access. As an Activity Insight Administrator, you will land on the **Setup** or **Dashboard** page. Faculty, on the other hand, will land on the **Manage Your Activities** page.

Note: Currently, it is not possible to add a custom landing page to Activity Insight. If you would like to provide additional resources to assist faculty in working with Activity Insight, it is suggested that you post them to a webpage hosted by your campus. If you are using Portal Authentication, this content could be part of the page where the authentication link is provided to faculty. Alternatively, a custom note can be added to the **Main Menu** to provide a link to this hosted webpage.

Left-Hand Menu

The Left-Hand Menu is on all Activity Insight screens and contains the basic navigation links. The large, colored buttons open main utilities where you can manage users and their activity data. The smaller links at the bottom of the menu provide additional functionality. Review descriptions beginning on page 39.

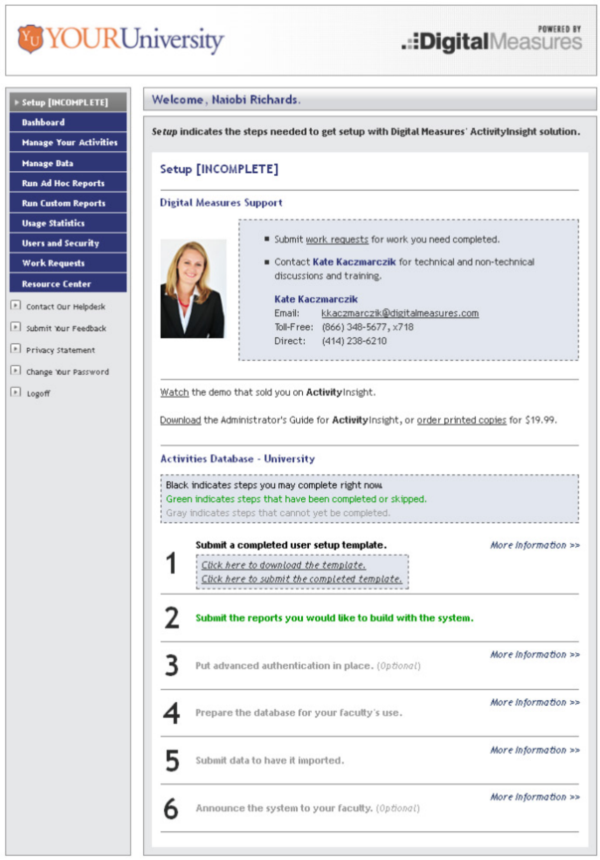
The main buttons will provide the following functionality, described briefly in the following pages and in more detail in the remainder of this guide.

Please note that you may not have all utilities displayed or functionality described here. The Left-Hand Menu is dependent upon the permissions assigned to your Activity Insight security role.

- **Setup**: Find your Client Manager's contact information and view the six steps in the setup process.
- **Dashboard**: Find your Client Manager's contact information, access resources and technical information, and track key aspects of Activity Insight.
- **Manage Your Activities**: Enter or manage your own teaching, research, and service activities.
- **Manage Data**: Enter or manage other users' teaching, research, and service activities.
- **Run Ad Hoc Reports**: Query the data in Activity Insight using the parameters you identify.
- **Run Custom Reports**: Run reports based on templates.
- **Usage Statistics**: View statistics on the use of Activity Insight by your users. These include the number of logins and number of records added or edited.
- **Users and Security**: Edit user account information or create, delete, or disable user accounts.
- **Work Requests**: Submit requests to Digital Measures to modify Activity Insight for your campus, view the status of open requests, and view completed requests.
- **Resource Center**: Connect with other Digital Measures clients to exchange ideas and access documentation.

Note: The text of Left-Hand Menu utilities and links cannot be customized.

Setup



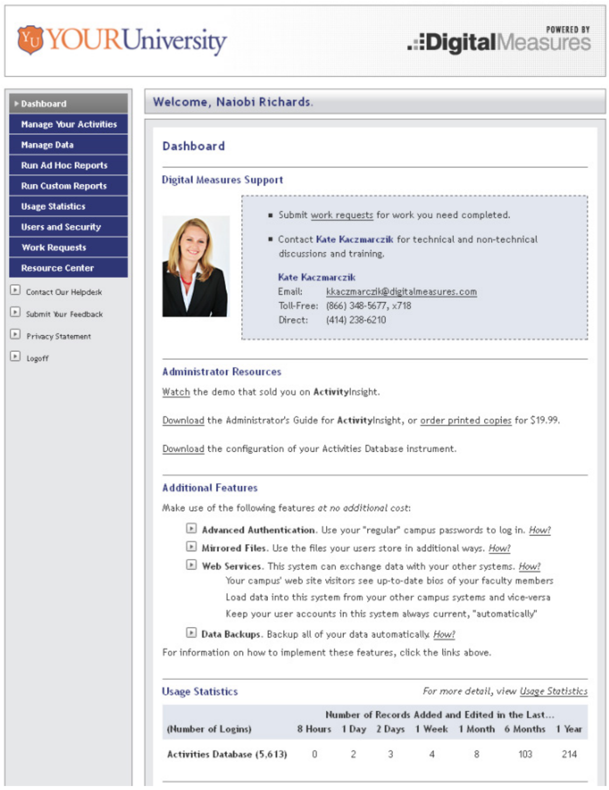
*The **Setup** utility.*

The **Setup** utility outlines the six steps in the setup process. Every time you access the **Setup** utility it is refreshed to reflect the setup step that is currently awaiting your campus's completion. The legend at the top of the screen indicates whether or not a step is available for completion.

Once you have completed each step in the setup process, the **Setup** utility will no longer be available from the Left-Hand Menu. However, the Activity Insight demo, the Activity Insight Administrator's Guide, and the implementation details for any optional step skipped during the setup process will still be available on your **Dashboard**.

For more information, see *Chapter 3: Setting Up ActivityInsight*.

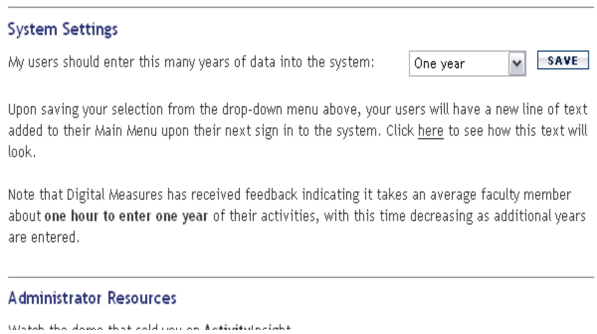
Dashboard



*The **Dashboard** utility*.

The **Dashboard** utility shows you important details about your instance of Activity Insight at a glance. Every time you access the **Dashboard** it is refreshed to reflect your campus's most recent activity in Activity Insight and available functionality. While the sections that appear on the **Dashboard** change over time – for example, to indicate the number of steps you have completed while you are in the setup process – it will always contain two sections. Additional Features alerts you to optional functionality that can be added at no additional cost. See *Chapter 10: Additional Features* for more information. **Usage Statistics** provides a snapshot of your campus's use of Activity Insight at that point in time. For more information, see "Usage Statistics" in *Chapter 2: Navigating ActivityInsight*.

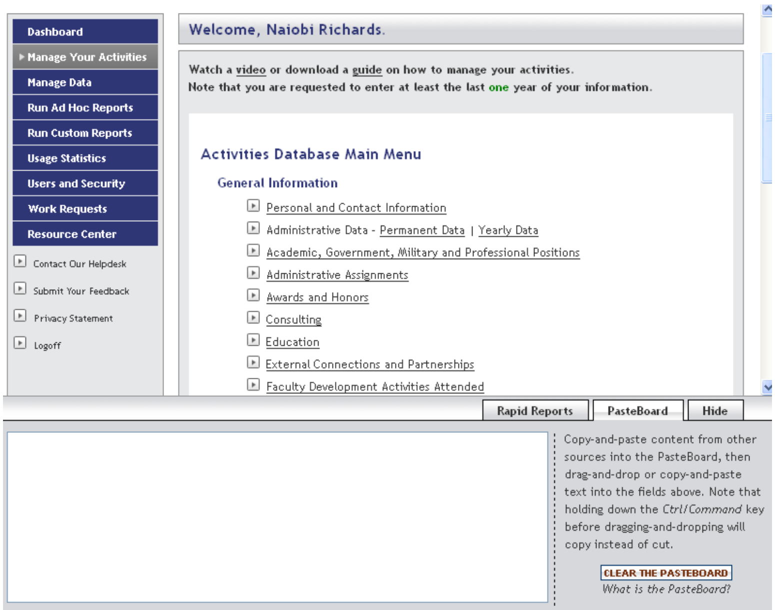
This is also the utility from which you can download the most current version of the Activity Insight Administrator's Guide and the current Configuration Report for your Activity Insight instrument. See "Configuration Report" in *Chapter 6: Customizing Screens and Fields* for more information.



*The **System Settings** section of the **Dashboard** utility.*

From the **Dashboard** you will also be able to specify a guideline for faculty on the number of years of data that should be entered into Activity Insight. Selecting “One year” to “Ten years” will add a note to the top of the **Manage Your Activities** screen. Selecting “Their entire vita” will not add a note to the screen. Once you have made a selection, this note can be changed via a Screen Revision(s) work request. For more information on this guideline, see “Determining How Much Data to Include" in *Chapter 3: Setting Up ActivityInsight*.

Manage Your Activities



*The **Manage Your Activities** utility, showing the types of activities.*

The **Manage Your Activities** utility enables users to keep track of their own teaching, research, and service activities.

The instructional text on the top of the **Manage Your Activities** page will always contain links to faculty training materials, including a two-page Faculty Guide and a seven-minute faculty training video. If you have configured a faculty guideline for the number of years of data to enter into the system through the **System Settings** portion of the **Dashboard**, this note will appear just below the faculty training materials. Below this standard note, custom text may be added to communicate to your users.

The **Manage Your Activities** page includes links to each of the data collection screens in your system. For more information about customizing the screens and fields that collect activity data, see *Chapter 6: Customizing Screens and Fields*.

An expandable window, available only from the **Manage Your Activities** page or when managing data for a user, can be used to create **Rapid Reports** and to use the **PasteBoard**.

> **Note:** Please note that **Rapid Reports** and **PasteBoard** only work in browsers that support widgets. Browsers that support widgets include Internet Explorer for PCs and Mozilla Firefox.

Rapid Reports

Rapid Reports provides a way for you to quickly and easily run custom reports on the data in Activity Insight. By enabling you to run reports from the same pages into which you enter data, **Rapid Reports** gives you the flexibility to easily see the effect the data you enter has on your reports. **Rapid Reports** can be used when you are managing your own data or when you are managing data for others. If you are managing your own data, the **Rapid Reports** feature will return the selected report with just your data. If you run a report using **Rapid Reports** while managing another user's data, the report will contain that user's data.

> **Note:** Reports that are configured with custom parameters can normally be run from the **Rapid Reports** utility in a limited fashion. For these reports, the default value for each parameter will automatically be used to run the report. If one of these custom parameters is required for the custom report, a default *must* be set for the parameter in order for the report to be available through **Rapid Reports**. You can review the defaults for parameters on a given report by selecting the report in **Run Custom Reports**. To request that a default be applied to a custom parameter, submit a Report Revision(s) work request.
>
> Reports that have a default output option of Microsoft Excel, or that do not have a default value for required custom parameters, are not currently available from **Rapid Reports**.

PasteBoard

The **PasteBoard** enables you to copy up to 4K (4,000 bytes) of text from another document, such as your vita in Microsoft Word, and paste it into the **PasteBoard**. After you have pasted text into the **PasteBoard**, you can then select text from it, click-and-hold on the text you selected, and drag it into a system field to paste it into that field. As long as no more than 4K of text is in the **PasteBoard**, the text entered there will be maintained as a user moves from screen to screen or even between utilities within Activity Insight. To remove this text, use the **Clear PasteBoard** button.

If users report difficulties using the **PasteBoard**, there are several common troubleshooting tips that should be implemented. Instruct the user to:

- Clear their browser cookies and restart their browser
- Verify that nothing is blocking the storage of cookies for the browser they are using

- Ensure that too much data is not being pasted into the **PasteBoard** - remember the 4K size limit

Unicode Compliance

You may copy and paste special characters - such as Greek or Latin characters, accent marks or other diacritical marks – into Activity Insight from another source, as long as they are Unicode-compliant. Unicode is an industry-standard set of characters that allows computers to consistently represent and manipulate text expressed in any of the world's writing systems. For more information about Unicode, please see: http://www.unicode.org/faq/basic_q.html.

Examples of fonts that are Unicode-compliant include Arial and Times New Roman. Examples of fonts that are not Unicode-compliant include Symbol and Wingdings. If characters are not transferring to Activity Insight as you expect, try changing their font in the source software application to Arial or Times New Roman and then copy and paste the text into Activity Insight. For characters that are typically entered as symbols, you may need to change the underlying font of the character, in addition to the display font. To do this in Microsoft Word, navigate to **Insert** > **More Symbols**, and update the font of the symbol to a Unicode-compliant font prior to selecting and inserting the desired character. This ensures that the underlying font *and* the display font are Unicode-compliant, and that the symbols can be rendered correctly in Activity Insight.

Note: Mac and PC versions of Microsoft Word often differ in how special characters are converted when switching to a Unicode-compliant font. The PC version of Word will copy special characters as images, which means they cannot be transferred into Activity Insight unless they are replaced by symbols in a Unicode font. Defining the font for the symbol separately from the font of the text, as defined above, becomes important. The Mac version of Word converts the special character to a matching special character in the Unicode-compliant font, allowing the character to be transferred into Activity Insight.

Manage Data

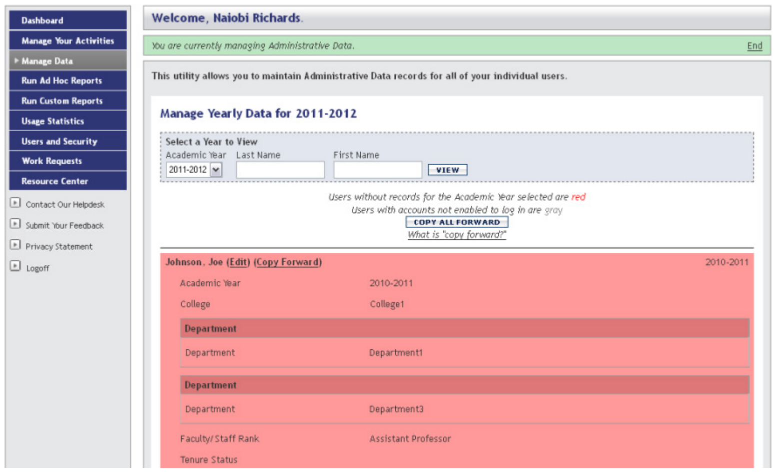
*The **Manage Data** utility.*

On the **Manage Data** page, users can manage the activity data for other users for whom they have permission to do so. **Manage Data for Individuals** enables you to access another user's activity data. **Manage Administrative Data for Individuals** provides you with a central location from which you can easily copy users' **Yearly Data** records, as your security permissions allow, from one year to the next.

See below for more information on **Manage Administrative Data for Individuals**.

Note: The green bar at the top of the page indicates whose data you are currently managing.

Manage Administrative Data



*The **Manage Administrative Data** utility within the **Manage Data** utility.*

It is very important to ensure that every user has current and accurate **Administrative Data - Yearly Data** records, as the most recent **Yearly Data** record is used for two purposes. First, it indicates the college and department assignments that affect the security and reporting available to the user. Second, it dictates which data collection fields and screens a user can see.

The **Manage Administrative Data** utility gives administrative users a central place to manage the **Yearly Data** records for those users within their scope of access. Rather than needing to **Manage Data** for each individual user separately in order to update or create **Yearly Data** records, you can manage these in bulk here

Manage Administrative Data will present you with the ability to select a specific year's **Yearly Data** records to view, defaulting to the current academic year. A list of the **Yearly Data** records for that academic year will appear. If a user does not have a **Yearly Data** record for the selected academic year, the most recent existing record for that user will display, and will be highlighted in red. If a user's account has been disabled, his or her most recent **Yearly Data** record will be presented, but in grey. From here you will be able to edit one **Yearly Data** record at a time, copy an individual user's most recent **Yearly Data** record forward to create a **Yearly Data** record for the selected academic year, or perform this **Copy Forward** function in bulk.

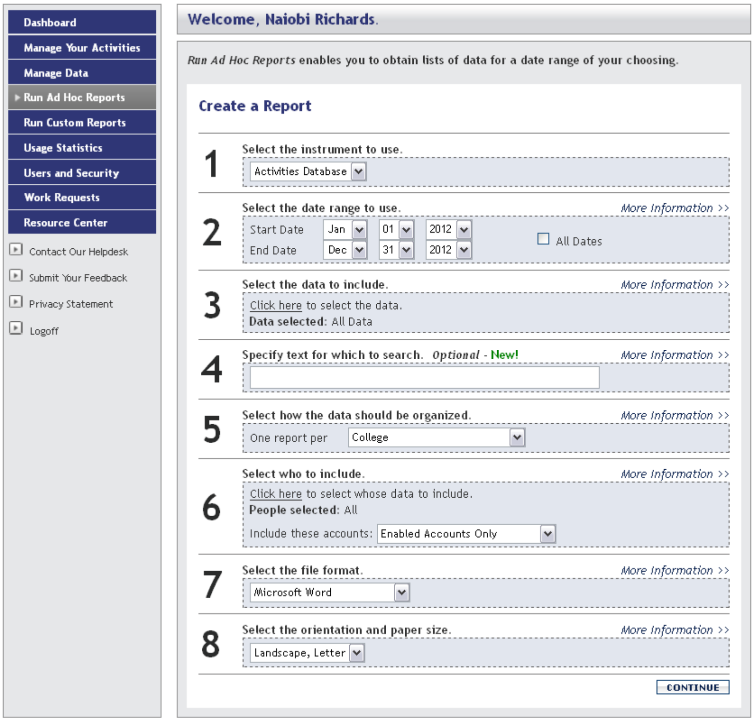
- **To perform the bulk Copy Forward function:**

1. Select the academic year up to which you want to copy **Yearly Data** records.
2. Click **View** to ensure the **Manage Administrative Data** utility reflects the records relevant for the selected academic year.
3. Click **Copy All Forward**.

4 In the confirmation pop-up, click **OK**.

> **Note:** If you have customized the **Yearly Data** screen to collect data by term and year or by calendar year rather than academic year, the **Manage Administrative Data** utility will account for this. Be sure to review the confirmation message carefully when using the **Copy All Forward** function to ensure records are being copied forward as expected.
>
> **Yearly Data** records cannot be copied forward for disabled user accounts.

Run Ad Hoc Reports

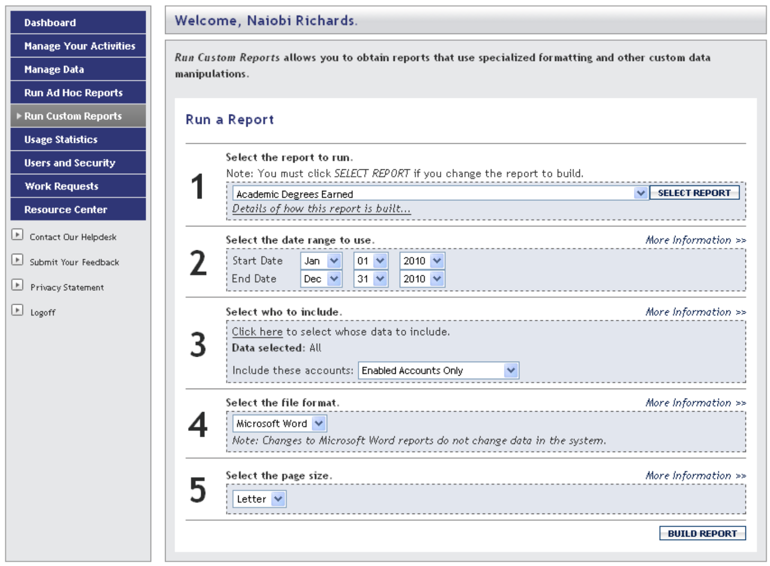


*The **Run Ad Hoc Reports** utility.*

Run Ad Hoc Reports enables you to create custom, single-instance reports using any or all of your campus's data, for the users for whom you have been granted permission. There are eight steps to running an ad hoc report. Each step helps you create and define the parameters that will be used to construct the report. Note that one of the parameters enables you to specify terms to search for when generating your report.

For more information, see "Running Ad Hoc Reports" in *Chapter 8: Running Reports.*

Run Custom Reports



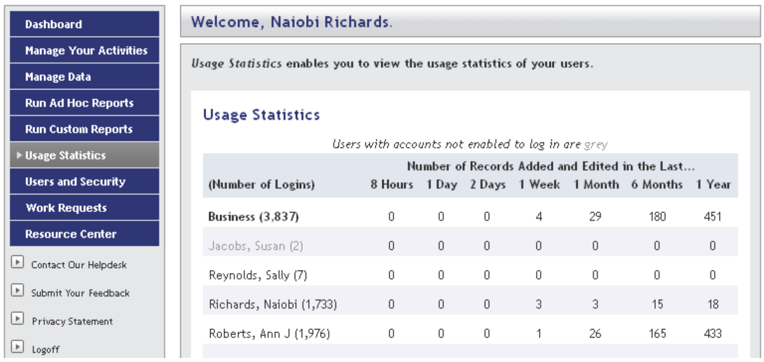
*The **Run Custom Reports** utility.*

Run Custom Reports is a template-based reporting utility. Here you will find reports that come with Activity Insight, as well as custom reports you have built. The following reports are provided by default:

- Academic Degrees Earned
- Awards and Honors
- Birthday Report by Month
- Contracts, Grants, and Sponsored Research by Faculty
- Creative Works by Faculty
- Editorial and Review Activities by Faculty
- Faculty/Staff Directory
- General Service by Faculty
- Intellectual Contributions by Faculty
- Presentations by Faculty
- Scheduled Teaching by Faculty
- Vita

For more information, see “Running Custom Reports” in *Chapter 8: Running Reports.*

Usage Statistics



*The **Usage Statistics** utility.*

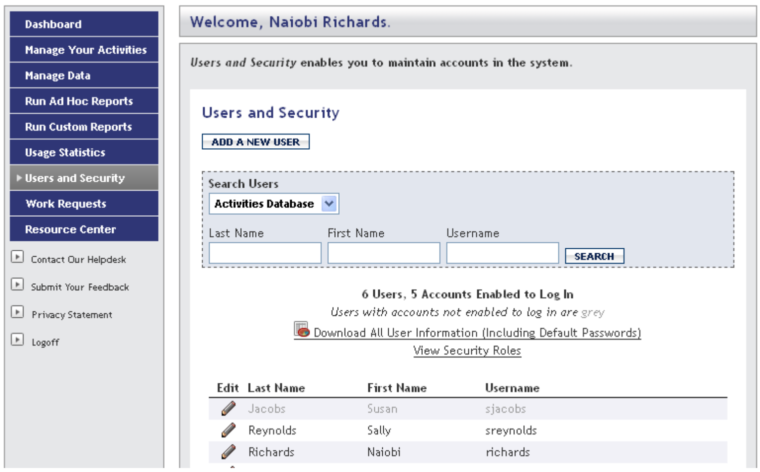
Usage Statistics provides a snapshot of your use of Activity Insight at that point in time. It offers the ability to view these statistics for anyone for whom you have permission, as long as the user also has a Yearly Data record with a College and Department assigned. You can view and explore the statistics on a user-by-user basis.

Usage Statistics only applies to users for which activities are tracked in Activity Insight – users with **Manage Your Activities**. If a user has the ability to track his or her own activities and has added or edited records, but has not been assigned to a College and Department through his or her Yearly Data record, this user's account activity will still be included in the instrument total. For example, his or her activity would be included in "Business" totals in the screenshot above.

If you would like to review users' records on a more granular basis, new custom reports can be built to help you do so. For example, you may want a report that shows all users who do not have publication or presentation activity records for a particular date range. A custom report can be built to pull such information. Just provide the criteria to use and the format for the desired report in a Report Setup work request and Digital Measures will build it. For more information about building custom reports, see *Chapter 8: Running Reports*.

Note: If you need further details regarding changes that specific users have made, or which user made a specific change to a record in Activity Insight, please submit a General work request noting the need for an audit of that user or record.

Users and Security



*The **Users and Security** utility.*

The **Users and Security** utility enables you to manage the user accounts in your system. You can

- Create a new user account
- Search for a user account
- Update the name, username, and email address associated with an account
- Change the authentication method for a user account
- Change the security roles to which a user account is assigned
- Disable and enable a user account
- Delete a user account
- Request that a user's password be emailed to them if the user is on Local Authentication
- Review your campus's security roles and their permissions
- Download All User Information (Including Default Passwords). Passwords are only available for users on Local Authentication who have not changed their password.

The bottom section of **Users and Security** will default to list all user accounts to which your account has access within Activity Insight. Selecting the pencil (edit) icon for a user enables you to perform the functions above for that account.

For more information about managing a user's activity entries using **Manage Data**, see "Manage Data" in *Chapter 2: Navigating Activity Insight*.

For more information about managing security roles, see *Chapter 4: Managing Security Roles*.

For more information about managing user accounts, see *Chapter 5: Managing User Accounts*.

Work Requests

*The **Work Requests** utility.*

Your users may request that specific changes be made to Activity Insight**.** To have these changes implemented, select the **Work Requests** utility. A work request is the formal method for initiating work to be completed on your behalf by Digital Measures.

To facilitate an integrated approach to the customization of Activity Insight, the **Work Requests** utility can only be provisioned to one account at the campus level and one account per college. By default, the University Administrator and College Administrator security roles are granted access to the **Work Requests** utility.

Through the **Work Requests** utility you can view the requests that you have submitted that have not yet been completed under the heading **Your Open Work Requests**. To view requests Digital Measures has completed for you, select the **View Completed Requests** link.

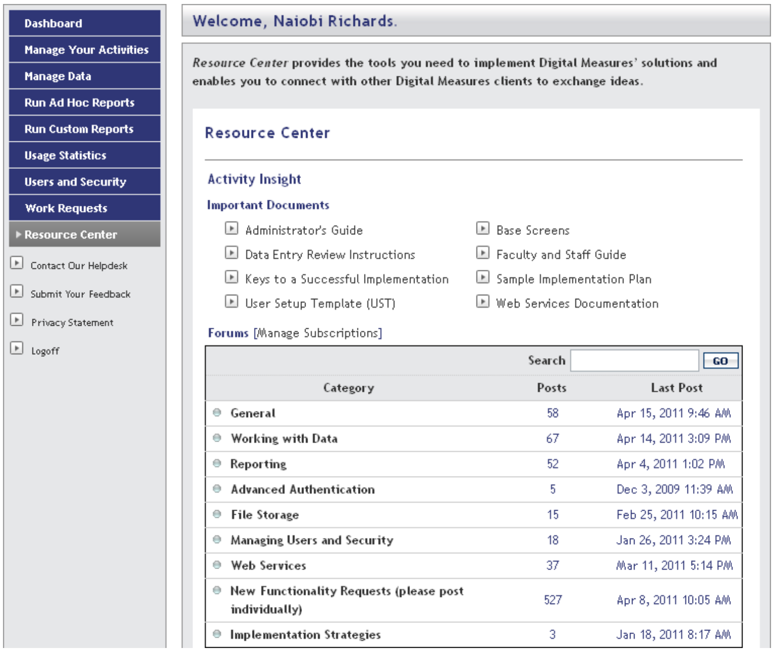
Work requests should be used to:

- Request screen revisions
- Submit data import files
- Submit reports to be built and revisions to existing reports
- Create and manage user accounts in bulk
- Change the permissions of Activity Insight security roles
- Set up additional features
- Request additional revisions that should be made to your system

For more information, see *Chapter 9: Managing Work Requests*.

Note: As access to the **Work Requests** utility indicates an active role in the oversight, implementation and maintenance of Activity Insight, users with this utility will on occasion be sent announcements from Digital Measures. Such announcements are sent via email, and pertain to enhancements to Activity Insight or other Digital Measures initiatives.

Resource Center



*The **Resource Center** utility.*

The **Resource Center** provides additional documentation and a forum that enables you to connect with other Digital Measures clients to exchange ideas and solutions, and search topics for Activity Insight best practices and answers to frequently asked questions. The **New Functionality Requests** forum enables you to submit new and endorse existing topics for Activity Insight features you would like to see Digital Measures develop in the future.

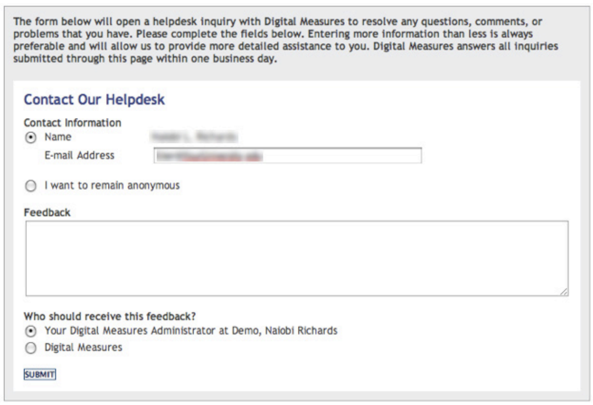
> **Important:** Be sure to subscribe to the forums and threads in which you have interest to receive updates as contributions are made by other clients or Digital Measures.

Other Left-Hand Menu Links

In addition to the main links in the Activity Insight Left-Hand Menu, there are five other smaller links that provide additional functionalities available to all of your campus's Activity Insight users.

Contact Our Helpdesk and Submit Your Feedback

When your users have a problem using Activity Insight, they can send a support request using the **Contact Our Helpdesk** page.


The form below will open a helpdesk inquiry with Digital Measures to resolve any questions, comments, or problems that you have. Please complete the fields below. Entering more information than less is always preferable and will allow us to provide more detailed assistance to you. Digital Measures answers all inquiries submitted through this page within one business day.

Contact Our Helpdesk

Contact Information

Name

E-mail Address

I want to remain anonymous

Feedback

Who should receive this feedback?

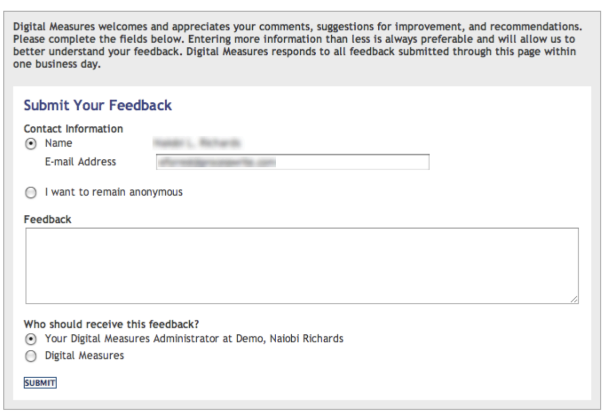
Your Digital Measures Administrator at Demo, Naiobi Richards

Digital Measures

SUBMIT

*The **Contact Our Helpdesk** page.*

All Activity Insight users can send comments and other feedback by selecting **Submit Your Feedback**.


Digital Measures welcomes and appreciates your comments, suggestions for improvement, and recommendations. Please complete the fields below. Entering more information than less is always preferable and will allow us to better understand your feedback. Digital Measures responds to all feedback submitted through this page within one business day.

Submit Your Feedback

Contact Information

Name

E-mail Address

I want to remain anonymous

Feedback

Who should receive this feedback?

Your Digital Measures Administrator at Demo, Naiobi Richards

Digital Measures

SUBMIT

*The **Submit Your Feedback** page.*

By default, users can choose to send their inquiries and feedback to either their Activity Insight University Administrator or directly to Digital Measures. If an Activity Insight College Administrator is in place for the user's college, a user's ability to send to the Activity Insight University Administrator is replaced by the user's Activity Insight College Administrator.

Customizing the Helpdesk and Feedback Utilities

Routing of Inquiries

Feedback and Helpdesk inquiries often consist of questions such as "Should I have access to Digital Measures?" or "Where should I record my membership in professional organizations?" These are things over which your campus has control, and are therefore best answered by your Digital Measures administrative or support team. To facilitate this, there are two customization options for routing messages from **Contact Our Helpdesk** and **Submit Your Feedback** that you can implement to replace the default behavior described above. These are:

- **Send all inquiries to the user's Activity Insight College Administrator**, if one exists, or else to their Activity Insight University Administrator. In other words, this no longer offers users the option of sending their inquiry directly to Digital Measures.

- **Send all inquiries to a single, specific email address that you determine and is configured behind the scenes.** The specific email address could be that of your helpdesk on campus, an individual or team you have designated to handle such inquiries, or you directly. This also removes the user's ability to send feedback directly to Digital Measures, and allows you to control the routing of these messages separately from the University and College Administrator roles assigned within Activity Insight.

It is recommended that you leverage one of these customization options to ensure that your users are always put in immediate and direct contact with someone on your campus who can address their questions and initiate any changes needed as a result of their input. Furthermore, this provides you with direct control over the messages relayed to your users regarding the decisions your campus made during the implementation and use of Activity Insight.

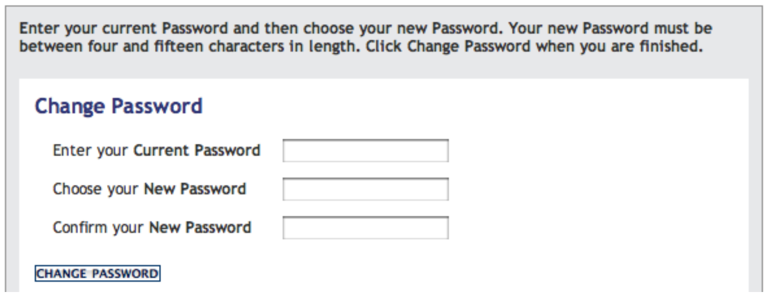
The customization decision you make regarding the routing of inquiries will apply to both **Contact Our Helpdesk** and **Submit Your Feedback**. To implement one of these configuration options, submit a General work request that includes the routing option you prefer, and if applicable, the specific email address to put in place for routing these messages. Please also consider providing revised instructional text and a confirmation message for these utilities to reflect the routing change. See below for more information.

Instructional Text and Confirmation Message

Instructional text can be added for both utilities and can be customized separately for each utility. The confirmation message displayed after an inquiry has been submitted can be customized as well, although this confirmation text must be the same for both **Contact Our Helpdesk** and **Submit Your Feedback**.

> **Note:** These utilities cannot be renamed, though the text describing the utilities can be changed.

Change Your Password



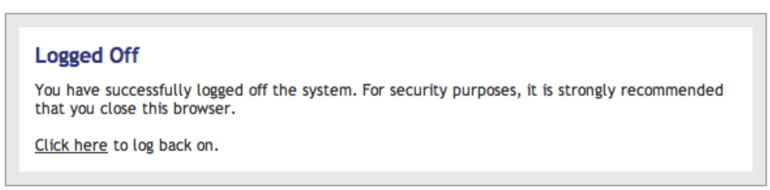
*The **Change Password** page.*

Any time you are logged in to Activity Insight, you can change your user account's password by selecting **Change Your Password** at the bottom of the Left-Hand Menu. You will need to supply your current password to make the change.

If you forget your password, you can request that it be sent to the email account associated with your account using the **Request Your Password** link on the login page.

> **Note:** Users whose authentication method is Shibboleth, Portal or LDAP Authentication do not have the option to change or request their passwords.

Logoff



*The **Logged Off** confirmation page.*

Logoff will log you off of Activity Insight. You will have to again authenticate to begin a new Activity Insight session. Sessions automatically time out after 90 minutes of inactivity. Note that 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. If using Portal or Shibboleth Authentication, when users log out they will be redirected to the URL provided to Digital Measures when you implemented Portal or Shibboleth Authentication.

> **Warning**: If you are using LDAP, Portal, or Shibboleth Authentication, selecting **Logoff** in Activity Insight will not automatically log you off your campus's portal.

Chapter 3: Setting Up **Activity**Insight

Overview of the Setup Process

Activity Insight works best when it has been properly configured and customized to fit your campus's unique needs for data capture and reporting. In the setup process, you will gather the necessary information about your future launch of Activity Insight. Colleges and departments comprising your campus may have particular needs for reporting due to accreditation requirements or the unique situation of that unit. Customizing Activity Insight may take some time but will give you a strong product that provides value to your entire campus.

The length of your setup process is determined by the number of units within your campus, the variances in the types of reports they require, the resources allocated by your campus, the priority and importance of implementing Activity Insight at your campus, and the amount of data already in electronic format at your campus. To put together an initial estimate of how long your implementation could take, use the Sample Implementation Plan.

Many of the steps are optional. They provide additional functionality but do not have to be completed to use Activity Insight. These include:

- Importing data into Activity Insight
- Implementing **Advanced Authentication**
- Setting up **Mirrored Files** to use the files your store, such as syllabi and presentation files, in additional ways
- Configuring **Data Backups**
- Implementing **Web Services** to automatically import data in Activity Insight from your existing information systems or to pull data from Activity Insight to use in your websites

The setup process may require assistance from your information technology staff. If this is the case, it is suggested you contact them early in the process.

Planning for ActivityInsight Integration

Before you get started with setting up Activity Insight, it is best to take some time to consider what degree of integration you will need and how you will gather your information. There are several decisions that need to be made before you get started.

- **Picking the launch date**
  When will your Activity Insight instrument need to be working so users can start entering their activity data? When will you need to start creating reports from their data?

  Provide sufficient time and support for users to get their data entered by the time you need to create the reports. The shorter the timeframe, the more likely your campus will need to provide support in getting the data entered. Such support may include the use of temporary workers, such as graduate students or departmental assistants.

- **Scheduling the launch work**
  When will your users have time to complete the pilot work?

  You do not want to insist on their entering data during the times of their heaviest workload.

- **Alerting technical staff**
  Has your IT support group been alerted that Activity Insight will be implemented for your campus?

  Notify your IT support group early in the process so they can schedule the work. If you plan to use Activity Insight features, such as using institutional credentials for login, storing related files on your campus servers, or integrating Activity Insight data into your campus websites, you will need to ensure they are available to assist in setting up these features.

- **Picking College Administrators, if applicable**
  Will you assign Activity Insight Administrators for each college? What administrative tasks will be delegated to them?

  Whoever it is, you need to select them early in the process to facilitate gathering reports and piloting.

- **Customizing Activity Insight for your reports and data**
  What reports do you want Activity Insight to compile for you? Do your activity data require customizations to the base data elements collected in Activity Insight?

  Digital Measures has several templates already created for major accreditation organizations and common reporting needs. However, you will want to take advantage of the customization service to create the exact reports you need.

- **Years of data**
  How many years of data do you need for your reporting requirements?

Entering faculty activity data takes about one hour per year, on average. Your most prolific researchers will require more time, as will people unfamiliar with such systems. Many campuses have rolling launches, initially capturing the most recent year of data, and then requiring the previous years' data be entered over time. In general, it is recommended that faculty not be asked to enter their entire vita in the initial data load.

- **Reusing existing data**
  What campus-wide databases hold information that can be imported into Activity Insight*?*

  Avoid re-entering activity data. If your units already have some of this information stored electronically, it will be easier to import. To do this, simply submit a Data Import work request. Your technical staff can also connect your databases to your instance of Activity Insight for automated updates using **Web Services**.

- **Providing data entry support**
  Can your campus or individual units provide staff to enter historical information?

  Many clients report that users have difficulty entering their past activities in a timely manner. Some have hired students to do the preliminary entry of vita data for users. Individual users should be required to review and approve the preliminary entries.

- **Usernames**
  What credentials will users need to login to Activity Insight?

  By default, Activity Insight creates usernames from users' email addresses. You may want to use a different username, especially if you will implement authentication to Activity Insight through either your campus's LDAP server or from your campus portal or intranet.

- **Authenticating**
  Will your users authenticate using an Activity Insight-specific username and password combination? Or, will you be implementing authentication using your campus credentials with LDAP Authentication or integrating Activity Insight into your campus's portal or intranet for seamless login?

  Integration with your portal provides the best security and convenience to your users, but requires more work from your campus's technical staff.

- **Storing more than just activities**
  What are the ways in which you want to use the files your users store related to their activities?

  You can give your faculty the opportunity to store documents, such as photographs, course syllabi, full texts of articles, presentation files, etc., to supplement their activity data in Activity Insight, These files can be retrieved in a variety of ways, including through reports. Consider implementing **Mirrored Files** to expand the number of ways you can use the files stored.

- **Integrating Activity Insight data into your websites**
  Do you want to include the data you store in Activity Insight *within your internal or external websites?*

With a little programming using **Web Services**, you can pull your information from Activity Insight and display it on your existing web pages to keep users' profiles updated, for example.

- **Piloting and testing Activity Insight**
  Whose data will be entered during the piloting phase of the project to test your Activity Insight *customizations and reports? Who at your campus will participate in the* Activity Insight *pilot?*

  You will want to pilot Activity Insight using real data for at least the past few years and by creating real reports. This will uncover any missing elements or needed customizations.

- **Communicating to users about Activity Insight**
  How will you communicate to your users about the Activity Insight *project?*

  The project communication plan is important. Every campus is different and you should, thus, communicate project details to your various stakeholders in the manner most appropriate to the realities of your campus.

- **Training**
  How will users be introduced to Activity Insight?

  Regardless of the approach you use, it is essential to provide clear and easily accessible training to users on Activity Insight. These sessions can also be used to further communicate the goals of the project, how the data are being used, and the security of Digital Measures servers. Because each college may have very different needs, it is suggested that separate training sessions be conducted for each. For information about training options for Activity Insight Administrators, see "Training" in *Chapter 1: Introduction*.

Your Client Manager is prepared to assist you in every part of your implementation process and can provide time-saving ideas from Digital Measures experience of implementing Activity Insight for many other clients across the globe.

> **Note:** The **Resource Center** is a great place to gain insight and share best practices with other Digital Measures clients on the implementation process.

Step 1: Submit a Completed User Setup Template

Before your users can begin entering information about their activities, they need Activity Insight user accounts. Manually entering each user into Activity Insight, one after another, is tedious and error-prone when you need to create accounts for many users at once. A more efficient method is to either supply your users' information in a User Setup Template or connect your existing systems to Activity Insight through **Web Services**. A User Setup Template captures basic user account information, which can be used to create user accounts in bulk.

Warning: All individuals for whom activity data are tracked must have a user account, regardless of their current status at your campus.

Without an account, a person cannot access Activity Insight. Nor can his or her activity data be tracked, since Activity Insight attaches activities to user accounts. Individuals who may require Activity Insight user accounts include:

- Current employees
- Users no longer with the campus but who have activities that must be included in historically accurate reports
- Staff who do not have tracked activities but who may be entering data on behalf of others
- Anyone tasked with entering data for another person, such as temporary data entry clerks or students hired for this purpose
- Anyone serving as an Activity Insight Administrator at any level

For more information, see *Chapter 5: Managing User Accounts*.

User Setup Template

Digital Measures has made it simple to add multiple users at one time using the User Setup Template. This method of creating accounts is most effective and time saving when ten or more users need to be created. For fewer than ten users, each user should be created manually. The User Setup Template can be accessed on the **Setup** page under step 1 by selecting the **Click here to download the template** link or through the **Resource Center**. For detailed information regarding the User Setup Template, see "User Setup Template" in *Chapter 5: Managing User Accounts.*

To prepare for the User Creation work request, simply collect the information from your existing databases and put it into the spreadsheet. Then submit the completed file to Digital Measures through Activity Insight using the **Click here to submit the completed template** link or as a User Creation work request. For more information about submitting User Creation work requests, see “Submitting All Other Types of Work Requests” in *Chapter 9: Managing Work Requests.*

By default, all user accounts created using the User Setup Template are assigned to the *Faculty* security role. To provision additional security for a user account, see “Assigning Security Roles to User Accounts” in *Chapter 4: Managing Security Roles.*

> **Note:** Digital Measures will compare the college and department values that you provide in the User Setup Template to your respective drop-down fields in Activity Insight. Therefore, the values you provide in this file should be entered the way you would want them to be displayed in reports that you run in Activity Insight.

Step 2: Submit the Reports You Would Like to Build with ActivityInsight

Digital Measures does a first pass at customizing Activity Insight for you using sample reports submitted by your campus. Having this information will enable Digital Measures to customize the various screens of Activity Insight and create report templates to fit the needs of your various colleges and departments.

Please be as complete as possible in gathering reports. Although you can add new reports at any time, doing so may require new data fields for activity entries. Users would then need to backfill every affected entry for all years to be included in the report—a process that will require your users to revisit their completed work. Collecting a complete set of reports up front enables Digital Measures to ensure your instance of Activity Insight reflects the requirements of the reports your campus needs to create.

Therefore, in addition to reports that meet your immediate needs, it is suggested that you include reports that will be required as part of your campus' long-term plans. For example, your campus may be starting a new program that has a different accreditation process. Include the reports required for the new program's accreditation, even if these will not be filed immediately.

Create a sample mock-up report in Microsoft Word or Excel for all reports that do not currently exist but that you want included in Activity Insight. For more information, see "Creating a Sample Mock-Up Report" in *Chapter 7: Customizing Reports.*

Each new report must be submitted as a separate Report Setup work request. For more information, see "Submitting Report Setup Work Requests" in *Chapter 9: Managing Work Requests*

Step 3: Put Advanced Authentication in Place *(Optional)*

The login, or authentication, process is important in that it plays a vital role in ensuring your Activity Insight data are secure. It is beneficial, however, to make it as easy as possible for your users to access Activity Insight. The more seamless authentication is for your users, the less likely they are to forget passwords or write them on notes in their offices, compromising security. **Advanced Authentication** enables your users to log into Activity Insight using the same username and password they use for other purposes, such as signing in to a portal or accessing their email.

By default, Activity Insight users are authenticated using *Local Authentication*. Each user is assigned a username and password specific to Activity Insight, making it the least convenient authentication method for users because they have to remember another password.

Activity Insight also supports three methods of **Advanced Authentication**.

- **Shibboleth Authentication,** the most secure method and the one most convenient for users – this is the method Digital Measures recommends.
- **Portal Authentication,** where users access Activity Insight through a link in your campus portal.
- **LDAP Authentication,** where users login to Activity Insight using their campus user credentials.

Only one method of **Advanced Authentication** can be in place per campus at one time. However, Local Authentication is always available.

> **Note:** It is recommended that the Activity Insight University Administrator use Local Authentication so he or she can always access Activity Insight, even if your Shibboleth Identity Provider (IdP), portal, or LDAP servers are down.

For more information, see "Advanced Authentication" in *Chapter 10: Additional Features.*

Local Authentication

Local Authentication is the default authentication method. The username, unless you specify otherwise, is the text prior to the @ symbol in the users' email addresses. With Local Authentication, users must use a username and password combination set unique within Activity Insight.

This is the least preferred method for users. It is less secure because it forces them to remember another password. It is also much less convenient than Shibboleth, Portal, or LDAP Authentication.

Requirements

Local Authentication in Activity Insight requires that users use the Activity Insight login page.

Implementation Details

Because Local Authentication is the default for Activity Insight, no other actions are necessary from you other than creating user accounts. Digital Measures will create the initial passwords for the accounts. These passwords can be accessed either by directing users to use the **Request Password** link on the Login page, or you can request the password for the user by selecting the pencil (edit) icon in **Users and Security** and selecting **Request Password**. Upon signing into Activity Insight with this default password, users will be prompted to change their password.

Step 4: Prepare ActivityInsight for Your Faculty's Use

At various times during your Activity Insight implementation, you will want to pilot Activity Insight using a limited data set to test the customizations and reports. Have a limited number of users from within each of your units attempt to enter one year of activity data, or, if data are imported, review and approve the preliminary data. Reports will also need to be tested using real data.

Have the testers report their findings in the way most appropriate to your campus. Submit any changes to be made to your campus's instance of Activity Insight to Digital Measures as Screen Revision(s) work requests. For more information about submitting Screen Revision(s) work requests, see "Submitting All Other Types of Work Requests" in *Chapter 9: Managing Work Requests.*

You may choose to iterate the testing process, starting early in the implementation and testing the various elements as they come online. This is especially useful if you are implementing automatic data imports or the optional features.

Although you can add new screens and fields at any time, doing so may require users to backfill every affected entry for all years to be included in the report; this is a tedious process that will require your users to revisit their completed work. Collecting a complete dataset ensures that your Activity Insight instrument reflects the requirements of your campus.

Step 5: Submit Data to Have It Loaded

For Activity Insight to work, the information about the activities of users must be entered into the system. There are a few ways to do this:

- Manual entry by the vita owner, putting the responsibility on users.
- Manual entry by support staff or temporary workers on behalf of users.
- Electronic import from exported data from your existing systems, such as a CSV file of data from your course management system. Comma separated values (CSV), also referred to as “comma-delimited,” is a file format in which each line is one record and the fields in a record are separated by commas.
- Automate importing of data from your existing systems using **Web Services**.

> **Note:** All methods except manual entry by the vita owner can be done before the launch of Activity Insight to your users.

By simplifying the process of importing data, you can reduce the time users must spend during the initial launch, increase their buy-in into this new process, and provide them with clear templates going forward.

Rather than having your users enter all their data manually, try to use other methods outlined above. Although importing data from other systems takes development time and hiring students or temporary workers adds costs, these methods increase the likelihood that your initial launch will be successful.

Determining How Much Data to Include

Digital Measures encourages you to thoroughly consider how many years of data must be entered for the initial setup and launch, and generally recommends that clients ask their faculty to enter the last one or two years of their data in their first year using Activity Insight. The level of buy-in you will receive for the initiative is very much a function of the amount of work your users are required to perform. And, the amount of work that must be completed to use Activity Insight is strongly correlated to the number of years of historical data each campus would like to have within Activity Insight. While entire vita can certainly be entered, the final decision on how much data you would like to include is entirely up to you.

Many clients look to enter between one and ten years of data in the first few years using Activity Insight because they need to report on data from only this period of time. Perhaps an accreditation site visit taking place in three years will require reports on the last ten years of users’ activities. In this case you would likely want to enter activities from the previous seven years. Some clients ask their users to enter only their activities for the current academic year and then maintain that data going forward. Others maintain entire vita within Activity Insight, including some individual users who are not required, but find it convenient, to track all their vita data in Activity Insight.

Once a user is familiar with Activity Insight, entering activity data takes about one hour per year of activity. This number varies with the number of activities and the abilities of the person.

Manual Entry by Support Staff

Some clients have found that users simply are not up to the challenge of entering their initial activity data. By using support staff or students to enter preliminary activity data into Activity Insight, followed by review and approval from the users, campuses have found that their launches go much smoother. It also reduces the time it takes to get a base of useful data into Activity Insight.

The idea behind this option is that users will find it easier to work with the preliminary data, approve it, and ensure it is both complete and correct, than do the "tedious" work of entering activities.

There is some information, however, that is too sensitive to be entered by temporary staff, such as promotion and tenure data. In other cases your users may be the only ones who can define certain data, such as whether journal articles are peer-reviewed. Users should enter these data themselves.

Import Data from Existing Campus Systems

Many of the data required for your instance of Activity Insight already exist in electronic format in various systems on your campus. For example, much of the personal information required in the Administrative Data and Personal and Contact Information sections is usually found in your campus's human resource system, and the courses your users taught are in your course management system.

Many existing electronic data can be converted into a file format that can be easily reworked to fit the import requirements of Activity Insight. Electronic data that can be converted to a CSV file, with column names matching the names of the appropriate Activity Insight data fields, can be used. This might include parsing the data in vita that follow a standardized format and putting the data into a CSV file.

These export files must be prepared in CSV format and include the Activity Insight username. Submit the file through a Data Import work request to Digital Measures. For more information see "Submitting a Data Import Work Request" in *Chapter 9: Managing Work Requests.*

Automate Importing Data from Your Existing Systems with Web Services

As detailed above, data can be exported from your other systems into files that are then imported into Activity Insight. If you want data to be imported into Activity Insight more frequently, please consider using **Web Services**. Digital Measures supports interoperability and automation with your existing systems via **Web Services.** Through **Web Services**, you can:

- View your Activity Insight instrument configuration
- Import and export data
- Create and manage user accounts
- Assign and manage security roles

For more information, see “Web Services” in *Chapter 10: Additional Features.*

Step 6: Announce ActivityInsight to Your Faculty

If desired, Digital Measures can send an email message to everyone on your campus with a user account in Activity Insight to give them everything they need to access Activity Insight, including information regarding login credentials and instructions. To send this email, Digital Measures simply needs to be supplied with the subject line and body of the message you would like sent and the timing for the message.

To have Digital Measures send this launch message, submit a General work request from within Activity Insight. In the request, specify the following:

- "From" name for the email
- "From" email address for the email, to which replies will be sent
- Subject line of the message
- Contents for the message body
- Date and time to send the message

> **Note:** Please allow for a buffer of at least five business days between submitting the work request and the send date and time requested for the announcement.

For an example of the contents of a broadcast email message, see *Appendix A: Sample Broadcast Email*. For more information about submitting a General work request, see "Submitting All Other Types of Work Requests" in *Chapter 9: Managing Work Requests*

Chapter 4: Managing Security Roles

Overview of Security Roles

You can assign security access within Activity Insight to ensure your users can access the utilities they need by assigning users to *security roles*. Security roles contain permissions and can be assigned at various scopes. Examples of these scopes include the whole campus, a college, a department, or an individual faculty member. This chapter discusses the various permissions and the ways in which they can be combined to grant individual users the access they need.

> **Note:** The users to whom one has access through a college or department-level security role are determined based on the most recent **Yearly Data** record for each user who is tracking activities in Activity Insight.

Creating and Changing Security Roles

To change or create security roles, submit a General work request detailing the new roles or the changes to existing roles that you would like. To help prevent misunderstanding, please be as clear and concise as you can when describing the changes to permissions. For more information about submitting a General work request, see "Submitting All Other Types of Work Requests" in *Chapter 9: Managing Work Requests.*

Assigning Security Roles to User Accounts

Activity Insight Administrators can modify security role assignments for any user for whom they have permission. For more information, see "Changing a User's Security Roles" in *Chapter 5: Managing User Accounts.*

Security Role Permissions

The available security role permissions, each corresponding with a utility, are outlined below, along with a brief description of each permission.

> **Note:** Whether or not a user has the ability to manage their activities is provisioned separately from their security role when a user account is created.

- **Setup**: Find your Client Manager's contact information and view the six steps in the setup process.
- **Dashboard**: Find your Client Manager's contact information, access resources and technical information, and track key aspects of Activity Insight.
- **Manage Data**: Enter or manage other users' teaching, research, and service activities.
- **Manage Administrative Data**: Easily copy the Yearly Data records from one year to the next for users for whom you have permission, or update these users' Yearly Data records from a central location.
- **Run Ad Hoc Reports**: Query the data in Activity Insight using the parameters you identify. Determine which users should have the ability to include hidden fields in ad hoc reports.
- **Run Custom Reports**: Run reports based on templates. The reports to which a user has access can be further restricted by the user's college. For more information, see "Running Custom Reports" in *Chapter 8: Running Reports.*
- **Usage Statistics**: View statistics on the use of Activity Insight by your users. These include the number of logins and number of records added or edited
- **Users and Security**: Edit user account information or create, delete, or disable user accounts.
- **Work Requests**: Submit requests to modify Activity Insight, view the status of open requests, and view completed requests. The **Work Requests** permission can only be provisioned to one account at the campus level and one account per college. By default, the **Work Requests** permission is provisioned to the University Administrator and College Administrator security roles. This permission opts a user into receiving email announcements from Digital Measures.
- **Resource Center**: Connect with other Digital Measures clients to exchange ideas and access documentation.
- **Change Your Password**: Change the password for your user account. Provisioned to all default security roles. Only enabled if the user authenticates using Local Authentication.

Default Security Roles

A default set of security roles is already in place with your system, which should meet most of your needs. However, you can modify the default security roles and create new security ones. See above for more information.

Only one user account can be assigned to the University Administrator or College Administrator security role. This is because Administrator security roles have the **Work Requests** permission, which can only be provisioned to a single account at the campus or college levels.

The security roles below are in descending order, grouped by scope, then sorted by permissions. They are not in the same order in which they appear in the **Users and Security** utility. The default roles containing **Run Ad Hoc Reports** have the **Show Hidden Data** option applied.

Table 1: Default security roles and their respective permissions, from least to most restrictive.

Security Role	Setup	Dashboard	Manage Data	Manage Administrative Data	Run Ad Hoc Reports	Run Custom Reports	Usage Statistics	Users and Security	Work Requests	Resource Center	Change Your Password
University Administrator	■	■	■	■	■	■	■	■	■	■	■
University Limited Administrator	■	■	■	■	■	■	■	■		■	■
University			■		■	■					■
College Administrator	■	■	■	■	■	■	■	■	■	■	■
College Limited Administrator	■	■	■	■	■	■	■	■		■	■
College			■		■	■					■
Department			■		■	■					■
Faculty						■					■

The University Administrator Security Role

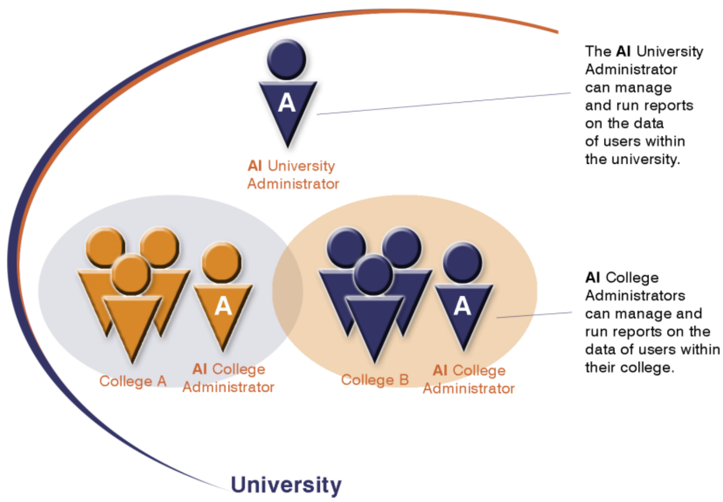


Figure 1 - University vs. College Administrator Roles.

Assigning the ActivityInsight Administrator Roles

Activity Insight comes with four default types of Administrator roles that meet the general needs of many clients.

- **University Administrator:** Full access to Activity Insight, This includes access to all user accounts. Can submit work requests. Only one user account can be assigned to the University Administrator security role, as this security role has the **Work Requests** permission, which can only be provisioned to one user account at the campus level.
- **University Limited Administrator**: Has the same permissions as the University Administrator except the **Work Requests** permission. No restriction on the number of user accounts that can be added to this security role.
- **College Administrator**: Full access to Activity Insight for a specific college. This includes access to manage user accounts for that college. Can submit work requests for the college. Only one user account can be assigned to the College Administrator security role for each college, as this security role has the **Work Requests** permission, which can only be provisioned to one user account per college.
- **College Limited Administrator**: Has the same permissions as the College Administrator except the **Work Requests** permission. No restriction on the number of user accounts that can be added to this security role per college.

Note: If you are implementing Activity Insight for a single unit, your instrument will not contain the university-level administrative security roles.

Assigning Multiple Users to a Security Role with Work Requests Permission

- **If it is necessary to assign multiple users to an account that includes the Work Requests permission, your campus can:**

1. Create a user account for an email distribution list that your campus has established for all the users who need access to the **Work Requests** utility.
2. Submit a General work request to assign that distribution user account to the security role. This work request should indicate to what security role the user account already assigned to the security role with **Work Requests** permissions should be reassigned.

The requirements for a University Administrator distribution user account are as follows:

- The account first and last name needs to include the full, non-abbreviated name of your campus. For example, *First Name: Your Campus, Last Name: Work Group*.
- The account first or last name cannot include the text “Digital Measures,” “DM,” “Administrator,” or another term that could be confusing to other clients. This user account first and last name will be visible to other Digital Measures clients in the **Resource Center**.

The Individual Security Role

An additional security role that can be requested is an Individual security role. This role grants one user access to perform certain functions for another specific user. The supported permissions for an Individual security role are:

- Manage Data
- Run Ad Hoc Reports
- Run Custom Reports
- Change Your Password

One can be assigned to the Individual security role for as many users as needed. This role can be helpful if a user or a group of users needs to enter data on behalf of specific faculty members, or in a case where a user needs access to a custom report, like a Promotion and Tenure report, only for users who have reviews pending.

To request this security role, submit a General work request. Unless you specify otherwise, this role will be set up with the **Manage Data** permission and **Run Custom Reports** with access to the same reports as the Faculty security role.

Note: This is not a true proxy security role. The Individual security role will grant a user full access to all of another user’s data. For example, if the Individual role contains the **Manage Data** permission, a user assigned to this role will have access to all of the other user's data collection screens and fields, including ones that are hidden or read-only to that other user.

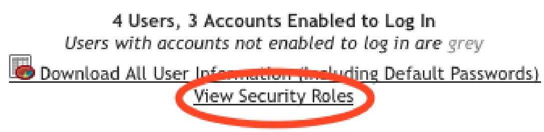
Reviewing Your Security Roles

Viewing the List of Permissions Assigned to a Security Role

You can quickly see all permissions provisioned to a particular security role by using the **View Security Roles** function.

- **To view all permissions provisioned to a security role:**

1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.
2. If you have access to multiple instruments, select the instrument for which you wish to view security roles. If you only have access to one instrument, proceed to step 3.
3. Directly above the list of users, select **View Security Roles**.



The Users and Security page showing the View Security Roles link.

4. On the **View Security Roles** page, find the security role you wish to examine.
5. Expand the list of permissions provisioned to a particular security role by selecting the plus sign (+) in front of **Permissions**.
6. The list of permissions for that particular security role appears.
7. If the role has the **Run Custom Reports** permission, select **Details** to see a list of the custom reports the role can run.

For information, see “Creating and Changing Security Roles” in *Chapter 4: Managing Security Roles.*

Viewing the List of Users Assigned to a Security Role

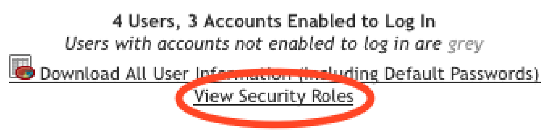
You can quickly see all users who are assigned to a particular security role by using the **View Security Roles** function.

- **To view all users associated with a security role:**

1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.

2 If you have access to multiple instruments, select the instrument for which you wish to view security roles. If you only have access to one instrument, proceed to step 3.

3 Directly above the list of users, click **View Security Roles**.



The Users and Security page showing the View Security Roles link.

4 On the **View Security Roles** page, find the security role you wish to examine.

5 Expand the list of users associated with a particular security role by selecting the plus sign ( ) in front of **Users**.

6 The list of users who have that particular security role appears.

7 To edit a user account in the list, select the pencil (edit) icon next to the user's name.

8 The **Edit User** page opens.

For more information about changing a user account's security roles, see "Changing a User's Security Roles" in *Chapter 5: Managing User Accounts.*

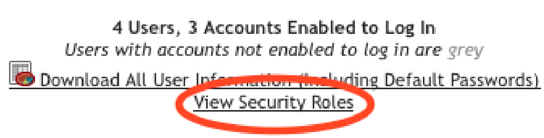
Downloading the Security Role Configuration Report

To download the Configuration Report of all of your Activity Insight security roles:

1 In Activity Insight, select **Users and Security** in the Left-Hand Menu.

2 If you have access to multiple instruments, select the instrument for which you wish to view security roles. If you only have access to one instrument, proceed to step 3.

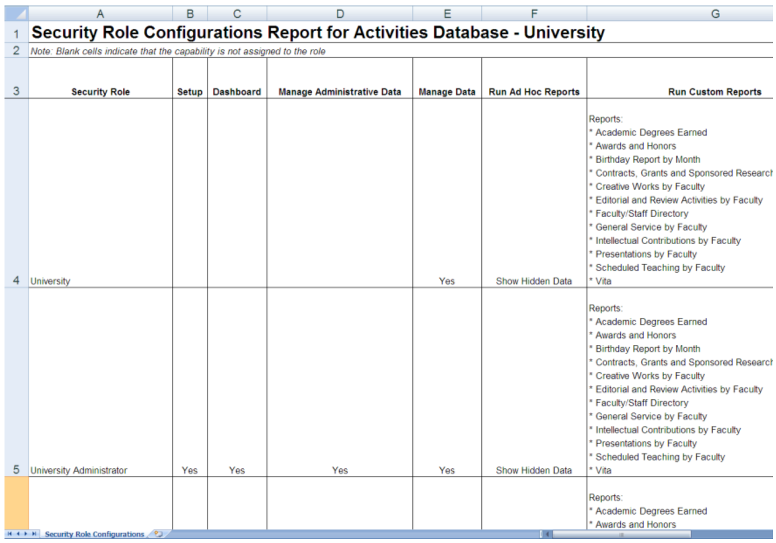
3 Directly above the list of users, select **View Security Roles**.



The Users and Security page showing the View Security Roles link.

4 Above the list of security roles, click **Download Security Role Configuration Report** to download a Microsoft Excel spreadsheet detailing each role and its permissions.

5



Security Role Configurations Report for Activities Database - University

Note: Blank cells indicate that the capability is not assigned to the role

Security Role	Setup	Dashboard	Manage Administrative Data	Manage Data	Run Ad Hoc Reports	Run Custom Reports
University				Yes	Show Hidden Data	Reports: * Academic Degrees Earned * Awards and Honors * Birthday Report by Month * Contracts, Grants and Sponsored Researcl * Creative Works by Faculty * Editorial and Review Activities by Faculty * Faculty/Staff Directory * General Service by Faculty * Intellectual Contributions by Faculty * Presentations by Faculty * Scheduled Teaching by Faculty * Vita
University Administrator	Yes	Yes	Yes	Yes	Show Hidden Data	Reports: * Academic Degrees Earned * Awards and Honors * Birthday Report by Month * Contracts, Grants and Sponsored Researcl * Creative Works by Faculty * Editorial and Review Activities by Faculty * Faculty/Staff Directory * General Service by Faculty * Intellectual Contributions by Faculty * Presentations by Faculty * Scheduled Teaching by Faculty * Vita
						Reports: * Academic Degrees Earned * Awards and Honors

6

A sample ***Security Role Configurations Report*** *in Microsoft Excel.*

Chapter 5: Managing User Accounts

Overview of User Accounts

Before your users can start entering information about their activities, they need Activity Insight user accounts. Without an account, a person cannot access Activity Insight. Nor can his or her activity data be tracked, since Activity Insight attaches activities to user accounts. Individuals who may require Activity Insight user accounts include:

- Current employees
- Users no longer with the campus but who have activities that must be included in historically accurate reports
- Staff who do not have tracked activities but who may be entering data on behalf of others
- Anyone tasked with entering data for another person, such as temporary data entry clerks or students hired for this purpose
- Anyone serving as an Activity Insight Administrator at any level

Manually entering each user into Activity Insight, one after another, is tedious and error-prone when you need to create accounts for many users at once. Methods that are more efficient involve supplying your users' information in a User Setup Template or connecting your existing systems to Activity Insight using **Web Services**. For more information about the User Setup Template, see "User Setup Template" in *Chapter 5: Managing User Accounts*. For more information about creating user accounts using **Web Services**, see "Web Services" in *Chapter 10: Additional Features.*

All Accounts Must Have an Email Address

Activity Insight requires that all user accounts have an associated email address, regardless of what you have decided to use as usernames.

At times, accounts must be created for someone whose email address is unknown. This can be the case for a person who does not have a valid email account at your campus, for whom a current email address is not known, or for someone no longer associated with the campus whose past activities will be entered by someone else. In these cases, simply enter a unique, fictitious email address for that user.

Usernames

Usernames are used for authentication and/or for importing data. Digital Measures uses the first part of users' email addresses for the Activity Insight username unless you specify something else. For example, if an account has an email address of `stacyp@yourcampus.edu`, the username `stacyp` will be created for the account.

You may want to assign a different username. For example, if you use LDAP Authentication the username in Activity Insight must match the campus username.

If you do not want to use the default username, you will need to assign a custom username. Add a `USERNAME` column to your User Setup Template spreadsheet and fill it with the usernames for the accounts.

The requirements for usernames in Activity Insight are that they:

- Must be unique
- Cannot contain the "@" character
- Cannot be longer than 50 characters
- Cannot contain non-Latin characters

Additional Unique User Identifiers

You may want to associate additional unique identifiers with user accounts to facilitate importing data from other campus systems. You can associate as many unique identifiers with a user account as you would like. Unique identifiers cannot be made required. Unique identifiers can only be used for importing data, not authentication. These identifiers are stored with the user account information within **Users and Security**.

To create and populate a new unique user identifier as part of creating your first set of user accounts, add a column to your User Setup Template spreadsheet for the new user identifier and fill it with the unique identifiers for the user accounts. The column header should reference the unique identifier the way you would like to refer to it in Activity Insight – for example, `EMPLID` or `UID`.

If you have already created your first set of user accounts and now need to add the unique user identifier and populate them for these accounts, use the Download All User Information spreadsheet as a starting point. You can simply retrieve a copy of this spreadsheet from Activity Insight, add a column for the new unique user identifier, populate it with the values for each account, and submit the revised spreadsheet through a User Creation work request. Just note that Digital Measures should add the new user identifier and the accounts will be updated with the values provided.

For more information about the User Setup Template, see "User Setup Template" in *Chapter 5: Managing User Accounts*.

For more information about the Download All User Information spreadsheet, see "Downloading User Account Information for All Users" in *Chapter 5: Managing User Accounts.*

Bulk Loading User Accounts

Activity Insight has several different functions to enable you to manage several user accounts at once. This will save time if you have to edit more than a few users. You can download a spreadsheet, to which you can add all users' account information, to create multiple users in Activity Insight at one time.

For more information, see "Managing Multiple User Accounts" in *Chapter 5: Managing User Accounts.*

User Accounts for Faculty and Administrators

Most of the user accounts you will create in Activity Insight will be for faculty who need to track their activities in the system. However, you may have some users who will need access to Activity Insight in order to run administrative reports or assist with managing data. These types of administrative users may not need to track their own activities. If an account for an individual in this category was set up to track activities, any records this user has created for him or herself will, by default, appear in reports.

To ensure that data for individuals meeting these criteria are excluded from reports, it is best to remove the ability to track activities – access to the **Manage Your Activities** utility – from their accounts. To do this, submit a General work request to Digital Measures with a list of the users for whom the ability to track activities should be removed.

> Warning: **Removing Manage Your Activities from an account permanently erases all of the data associated with it, including all activity entries.** Do not remove this ability to track activities from a user account unless you are certain you will never need the data in the future.

Creating User Accounts

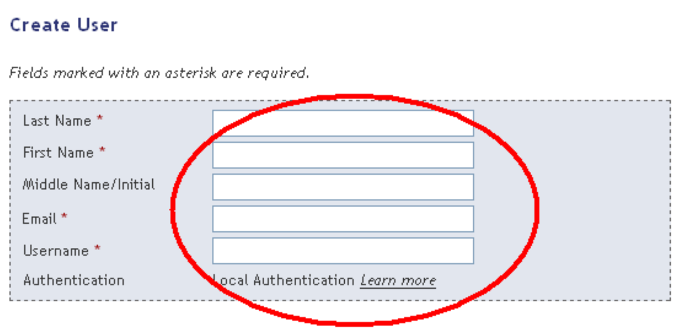
Although all administrators are encouraged to use the User Setup Template to create your user accounts in bulk, sometimes you will have only a handful or two of user accounts to add at a particular time. Administrators can quickly and easily add a new user account through the **Users and Security** utility's **Create User** page. From this page, you can assign a username, authentication method, and security roles.

> **Note:** If you are adding more than twenty-five new users, use the User Setup Template and create a User Creation work request. See "Step 1: Submit a Completed User Setup Template" in *Chapter 3: Setting Up Activity Insight* for more information.

Creating a New User Account

- **To create a new user account:**

1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.
2. Below the **Users and Security** page title, select **Add a New User**.
3. Type the user's first name, last name and email. The user's middle initial is not required but may be useful to differentiate faculty with the same name.



*The **Create User** page showing the general information boxes.*

> **Important:** Activity Insight requires that you type an email address for each user. If this user does not have one, enter a unique, fictitious email address.

4 Select the user's authentication method.

5 The **Authentication** drop-down list will show all your site's current authentication methods. If there is only one authentication method in place, Activity Insight will automatically select it for you.

6 In the Activities Database section, check **Yes** if this user will have information about his or her activities stored and tracked in Activity Insight.

7 You will want to select this for most of the Activity Insight accounts you create. Leave this box unchecked if the user is not someone for whom you have to store activity data – for example, if the account is for a student worker who is assisting with data entry.

8 Select the user's College(s) and Department(s) from the lists, if applicable.

9 If Activity Insight does not list this user's college(s) or department(s), you will need to submit a Screen Revision(s) work request to add it to Activity Insight. See "Submitting All Other Types of Work Requests" in *Chapter 9: Managing Work Requests* for more information.

> **Note:** Once the initial user setup is complete, college and department assignments can be edited using the Yearly Data screen.

10 Select all security roles that you want to give this user from the Security Roles list. For more information, see "Changing a User's Security Roles" in *Chapter 5: Managing User Accounts.*

> **Important:** Making changes to users' security at the college and department level will not affect their college and department assignments.

11 Review your choices for this user account and then select the **Save** button.

> **Important:** The first name, middle name, last name, and email address entered will be used to populate the respective fields on the user's Personal and Contact Information record. The college(s) and department(s) selected will be used to create a Yearly Data record, which corresponds with the current academic year, for the user.

Enabling a Disabled User Account

You can quickly enable a user account that has previously been disabled.

▸ **To enable a disabled user account:**

1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.
2. Search for the user or find the user in the list at the bottom of the page. The account for this user will be dimmed to indicate that it was disabled. Next, select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.

The pencil (edit) icon in the list of user accounts.

3. Select **Enable User**.
4. The user account is now enabled and listed in black in the list on the **Users and Security** page.

> **Warning:** If prior to selecting the **Enable User** button you made changes to any of the other elements of the user's account, these changes will not be saved when you select **Enable User**.

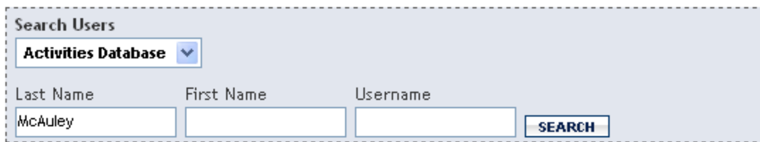
5.

Searching for User Accounts

The **Search Users** box enables you to easily find users by searching for their username, first name, or last name.

To search for a user:

1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.
2. In the **Search Users** box, type a last name, first name, and/or username, and click **Search**. You can also search using the first few letters of one of the items.



Searching for a user account by the user's last name.

3. A list of all users matching your search appears below the search box.

> **Note:** **Search Users** only searches the beginning of a name and does not accept wild cards such as `*` or `?`. For example, if you are looking for "John Smith", typing `Smi` in the **Last Name** box will find him but typing `ith` or `*ith` will not.

Changing and Updating Existing User Accounts

A user's account information can be edited through the **Users and Security** page in Activity Insight.

For instructions on adding or changing a user's activity entries, see "Manage Data" on *Chapter 2: Navigating ActivityInsight*.

- **To edit the details of a user's account:**

1 In Activity Insight, select **Users and Security** in the Left-Hand Menu.

2 Search for the user or find the user in the list at the bottom of the page. Then select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.

Edit	Last Name	First Name	Username
	McAuley	Paul	pmcauley
	Peterson	Snelling	snellingpeterson

The pencil (edit) icon in the list of user accounts.

3 In the **Edit User** page, make the changes to this user's account information.

4 Review your changes and select **Save** to save them and return to the **Users and Security** page.

Warning: If your campus is using the first part of users' email addresses as the usernames for Activity Insight users, which is the default setting for Activity Insight, changing a user's email address will also change that user's username.

Important: Updating a user's first name, middle name, last name, or email address will update the respective fields on the user's Personal and Contact Information record. A user's college(s) and department(s) are updated after the initial account creation by editing the user's current Yearly Data record.

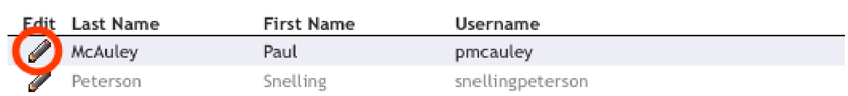
Changing a User's Authentication Method

If you have implemented a method of **Advanced Authentication** method - Shibboleth, Portal, or LDAP Authentication - you are able to choose between it and the default Activity Insight login method, Local Authentication. The next time the user logs into Activity Insight, he or she will have to use the newly selected method to log in. See "Advanced Authentication" in *Chapter 10: Additional Features* for more information.

> **Warning:** You can change the authentication method for Activity Insight for any user account at any time, except for users in the University Administrator or College Administrator security roles. This is to prevent these users from locking themselves out of Activity Insight. To change the authentication method for users in the University Administrator or College Administrator security roles, submit a General work request.

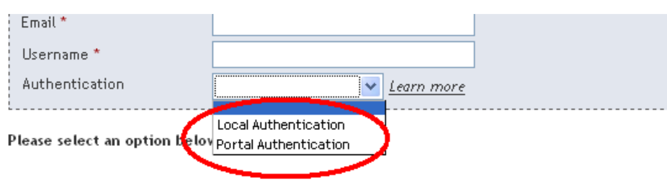
To change a user's authentication method:

1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.
2. Search for the user or find the user in the list at the bottom of the page. Then select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.



The pencil (edit) icon in the list of user accounts.

3. In the user details box, select the new authentication method from the **Authentication** drop-down list.



*The **Edit User** page with the Authentication list showing two choices.*

4 Review your change and select the **Save** button.

Sending Password Reminders to Users

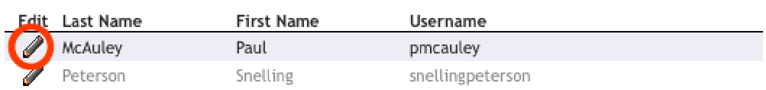
Your users may from time to time forget their passwords and need reminders sent to them. If you are using Activity Insight's default Local Authentication, you can have Activity Insight send a password reminder to the email address associated with the account.

> **Note:** Activity Insight cannot send the password to users whose authentication method is Shibboleth, Portal, or LDAP Authentication. In these cases, have the user contact your campus's IT support staff.

- **To provide a user with a lost password:**

1 In Activity Insight, select **Users and Security** in the Left-Hand Menu.

2 Search for the user or find the user in the list at the bottom of the page. Then select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.



The pencil (edit) icon in the list of user accounts.

3 In the **Edit User** page, select **Request Password**.

4 Activity Insight will send the current password to the email address associated with the account.

> **Note:** Users can request their own passwords by clicking **Request Your Password** at the bottom of the login page. Users whose authentication method is Shibboleth, Portal, or LDAP Authentication do not have the option to request their passwords, as these are not maintained by Digital Measures. In these cases, have the user contact your campus' IT support staff.

Changing a User's Security Roles

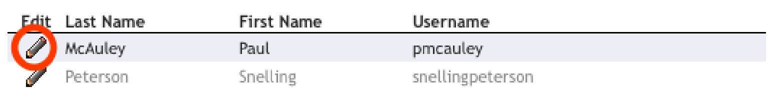
Administrators can add or remove security roles from any user for whom they have access to do so. For example, a College Administrator could add a new security role to a graduate student working in that college so he or she can update other users' activity entries, but could not change the security roles for a user in another college. The security roles available for an administrator to assign to his or her users depends on that administrator's own security role assignment. For example, a Department-level Administrator will not be able to modify a user's college-level security role assignments, but will be able to assign that user department-level security for his or her department. Note that the University Administrator can add or remove roles from any user.

If no current role will grant the right permissions to a set of users, you can request that a new security role be created. For more information, see "Creating and Changing Security Roles" in *Chapter 4: Managing Security Roles.*

To add or remove a security role from a user:

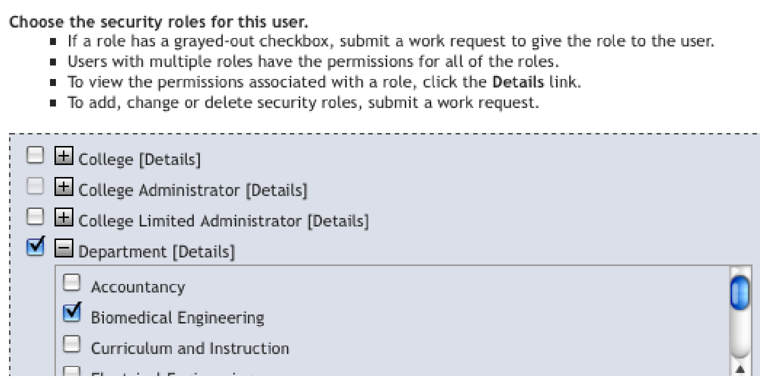
1 In Activity Insight, select **Users and Security** in the Left-Hand Menu.

2 Search for the user or find the user in the list at the bottom of the page. Then select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.



The pencil (edit) icon in the list of user accounts.

3 In the **Edit User** page, scroll to the **Choose the security roles for this user** section.



The list of security roles in the ***Edit User*** *page.*

4 Add or remove the security roles from this user account:

a) Add a security role by selecting the role's checkbox.

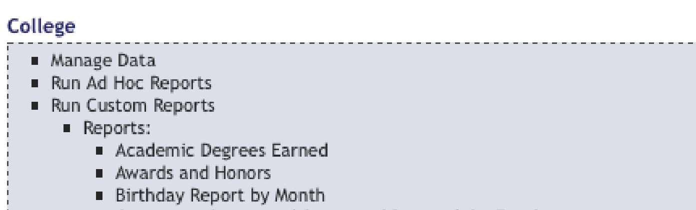
5 If the checkbox is dimmed and unavailable, you will have to submit a General work request to add the user to that security role. For more information, see "Submitting All Other Types of Work Requests" in *Chapter 9: Managing Work Requests.*

a) Remove a security role from a user account by selecting the checkbox to clear it.

6 To add or remove a role within a role group, select the plus sign (⊞) next to the group name to expand the group's list of roles. Then select or clear the role checkbox.

> **Warning:** An account has all of the permissions of every one of its security roles. Adding "more restrictive" security roles does not remove permissions from an account.

7 Select **Details** next to a security role or role group to open a pop-up window showing the permissions it will grant to the user.



Details of the College security role.

8 Review your changes and select **Save** to save them and return to the **Users and Security** page.

> **Note:** Making changes to users' security at the college and department level will not affect their college and department assignments.

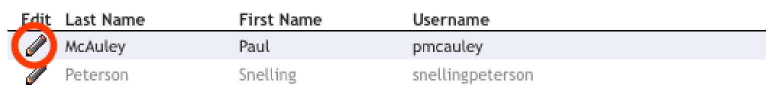
Disabling and Deleting User Accounts

Disabling a User Account

Disabling a user account prevents the person from accessing Activity Insight, although it still enables data to be managed for the user using the **Manage Data** utility. Disabled accounts are dimmed in the list of user accounts on the **Users and Security** page.

- **To disable a user account:**

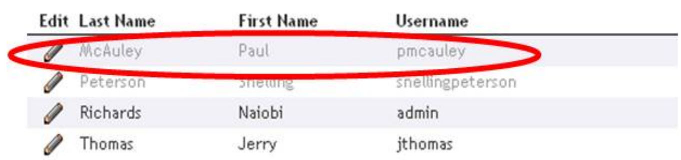
1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.
2. Search for the user or find the user in the list at the bottom of the page. Then select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.



Edit	Last Name	First Name	Username
	McAuley	Paul	pmcauley
	Peterson	Snelling	snellingpeterson

The pencil (edit) icon in the list of user accounts.

3. Select **Disable User**.
4. The user account is now disabled and dimmed in the list on the **Users and Security** page.



Edit	Last Name	First Name	Username
	McAuley	Paul	pmcauley
	Peterson	Snelling	snellingpeterson
	Richards	Naiobi	admin
	Thomas	Jerry	jthomas

Users list on ***Users and Security*** *page showing a disabled user account*.

> **Warning:** If prior to selecting the **Disable User** button you made changes to any of the other elements of the user's account, these changes will not be saved when you select **Disable User**.

Deleting a User Account

Warning: Deleting an account permanently erases all of the data associated with it, including all activity entries. Do not delete a user account unless you are certain you will never need the data in the future.

Most of the time, you will want to *disable* user accounts rather than *delete* them. Deleting a user account also deletes all of the activity data associated with that user. Most campuses will want to retain activity data for users who are no longer affiliated with their campus so that they can prepare reports that are historically accurate. If you decide to delete a user account, first use the **Run Ad Hoc Reports** utility to export all of the user's data.

To delete a user account:

1. Retrieve a copy of the user's data by running an ad hoc report. For more information, see "Running Ad Hoc Reports" in *Chapter 8: Running Reports*.
2. Select **Users and Security** in the Left-Hand Menu.
3. Search for the user or find the user in the list at the bottom of the page. Then select the pencil (edit) icon to the left of the user's name to open the **Edit User** page for that user.

Edit	Last Name	First Name	Username
	McAuley	Paul	pmcauley
	Peterson	Snelling	snellingpeterson

The pencil (edit) icon in the list of user accounts.

4. Select **Delete User** at the top of the page and then select **OK** to confirm that you want to **permanently delete this account.**
5. Activity Insight will remove the user account and all of its associated data.

Warning: Deleted user accounts cannot be restored through **Users and Security**.

Important: Some user accounts cannot be deleted or disabled through the **Edit User** page. To delete these users, submit a General work request to Digital Measures (see "Submitting All Other Types of Work Requests" in *Chapter 9: Managing Work Requests*). Please note that users who have submitted work requests cannot be deleted.

Remove Manage Your Activities for a User

Most of the user accounts you will create in Activity Insight will be for faculty who need to track their activities in the system. However, you may have some users who will need access to Activity Insight in order to run administrative reports or assist with managing data. These types of administrative users may not need to track their own activities. If an account for an individual in this category was set up to track activities, any records this user has created for him or herself will, by default, appear in reports.

To ensure that data for individuals meeting these criteria are excluded from reports, it is best to remove the ability to track activities – access to the **Manage Your Activities** utility – from their accounts. To do this, submit a General work request to Digital Measures with a list of the users for whom the ability to track activities should be removed.

> Warning: **Removing Manage Your Activities from an account permanently erases all of the data associated with it, including all activity entries.** Do not remove this ability to track activities from a user account unless you are certain you will never need the data in the future.

Managing Multiple User Accounts

You can save time creating user accounts for multiple users by bulk loading the data through a User Creation work request. With bulk loading, you create a file containing the information for the user accounts you want to add and submit it to Digital Measures as a work request. Digital Measures will create the user accounts.

The file must be in a spreadsheet format, such as Microsoft Excel or CSV format. For help on creating CSV files, see "Working With Comma-Delimited Files" in *Chapter 9: Managing Work Requests.*

User Setup Template

Digital Measures has made it simple to add multiple users at one time using the User Setup Template. The User Setup Template is a Microsoft Excel spreadsheet that Digital Measures created to simplify importing your existing user account information into Activity Insight, as this provides a structure for including the information necessary to create user accounts. You submit the completed spreadsheet and Digital Measures will create user accounts from it. This method of creating accounts is most effective and time saving when ten or more users need to be created. Fewer than ten users should be created manually. The User Setup Template can be accessed by selecting the **Click here to download the template** link under step 1 on the **Setup** page or through the **Resource Center**.

The User Setup Template contains a simple set of columns to capture basic information about your users:

- Last name (required)
- First name (required)
- Middle name/initial
- Email address (required)
- Department(s)
- College

You may want to associate additional unique identifiers with user accounts to facilitate importing data from other campus systems. To do this, add a column to this User Setup Template spreadsheet and fill it with the unique identifiers for the user accounts. The column header should reference the unique identifier the way you would like to refer to it in Activity Insight – for example EMPLID or UID. More information on unique identifiers can be found in the section "Additional Unique User Identifiers" in *Chapter 5: Managing User Accounts.*

Collect the information from your existing databases, put it into the User Setup Template, and submit the completed file to Digital Measures through Activity Insight using the **Click here to submit the completed template** link in **Setup** step 1, or as a User Creation work request. For more information about submitting User Creation work requests, see *Chapter 9: Managing Work Requests*.

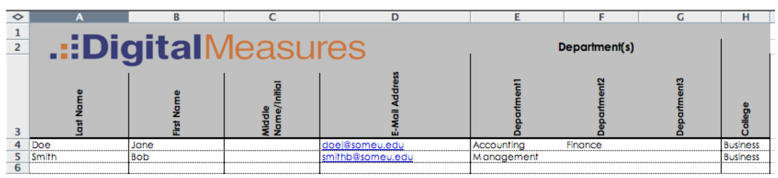
By default, all user accounts created using the User Setup Template are assigned to the *Faculty* security role. To provision additional security for a user account, see "Assigning Security Roles to User Accounts" in *Chapter 4: Managing Security*

Roles. Additionally, all user accounts created using the User Setup Template will be set up to have their activity data stored and tracked in Activity Insight. For this reason, it is best to create your administrative accounts on a one-off basis.

> **Note:** Digital Measures will compare the college and department values that you provide in the User Setup Template to your respective drop-down fields in Activity Insight. Therefore, the values you provide in this file should be entered the way you want them to be displayed in reports that you run in Activity Insight.

To complete the User Setup Template:

1. Login to Activity Insight and access the **Setup** page.
2. If you have already completed this step of the setup process, submit a User Creation work request.
3. Select the **Click here to download the template** to download the User Template spreadsheet link in step 1. You may be prompted to save the file to your hard disk, or it may automatically open in Microsoft Excel.
4. Open the spreadsheet and enter your data. You will probably want to import data from one of your existing systems.



Last Name	First Name	Middle Name/Initial	E-Mail Address	Department1	Department2	Department3	College
Doe	Jane		doe@someu.edu	Accounting	Finance		Business
Smith	Bob		smithb@someu.edu	Management			Business

The User Setup Template in Microsoft Excel.

> **Note:** If you are not using email addresses as the basis of your Activity Insight usernames, please add a “Username” column to specify these values.

5. Review your work and save the file.
6. In Activity Insight, select **Work Requests** in the Left-Hand Menu.
7. In the drop-down list, select **User Creation** and click **Continue**.
8. Click **Browse** to choose the User Setup Template you have created and then click **Upload File** to send the request to Digital Measures.
9. Digital Measures will process the request. Digital Measures will then notify you when the work is complete.

> **Note:** Your first User Setup Template should be submitted using the **Click here to submit the completed template** link under step 1 of the **Setup** utility.

Importing Additional User Data

It is recommended that you create user accounts first, and then import any data for those accounts separately through Data Import work requests. However, for your convenience it is possible to import data for the **Personal and Contact Information**, **Permanent Data** and **Yearly Data** screens through the User Setup Template if you already have the data at hand. To do so, add columns to the template for the fields on these screens into which data should be imported. Be sure to group the columns for each screen together. Also note that only data for the **Yearly Data** record for the current academic year should be included in this template. Data for past academic years should be imported through a Data Import work request after the user accounts have been created.

Importing activity data to the other data collection screens in Activity Insight is a separate process from creating user accounts. Such data must be submitted as Data Import work requests or via **Web Services** after the user accounts have been created. See “Submitting a Data Import Work Request” in *Chapter 9: Managing Work Requests* for more information on how Digital Measures can import data on your behalf. Alternatively, see “Web Services” in *Chapter 10: Additional Features* for more information on how you can set up automated imports of data to Activity Insight.

Downloading User Account Information for All Users

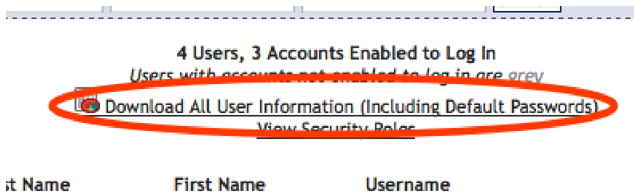
Activity Insight can generate a Microsoft Excel spreadsheet that contains information about all of your users. The file contains:

- First, middle, and last names
- Email addresses
- Activity Insight usernames
- The default password for each user
- Whether the user account is currently enabled or disabled
- Whether or not the user’s activity data are being stored
- College(s)/school(s)
- Department(s)
- Security roles

To download a spreadsheet with account information for all users for whom you have permission to do so:

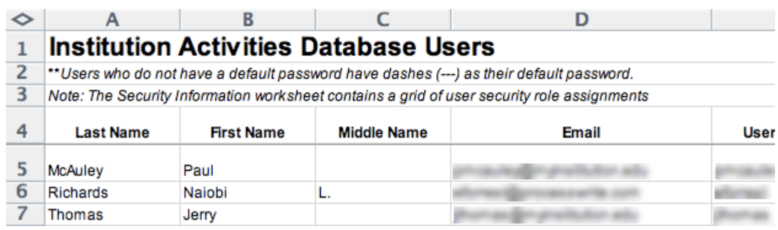
1. In Activity Insight, select **Users and Security** in the Left-Hand Menu.

2 Above the list of user accounts, select **Download All User Information (Including Default Passwords)**.



*The **Users and Security** page and the **Download All User Information** link.*

3 If prompted, open the file with Microsoft Excel. You may also save the file locally on your computer.



Institution Activities Database Users

***Users who do not have a default password have dashes (---) as their default password.*

Note: The Security Information worksheet contains a grid of user security role assignments

Last Name	First Name	Middle Name	Email	User
McAuley	Paul		[illegible]	[illegible]
Richards	Naiobi	L.	[illegible]	[illegible]
Thomas	Jerry		[illegible]	[illegible]

Sample user information spreadsheet.

Chapter 6: Customizing Screens and Fields

Overview of Screen Customization

Activity Insight has been honed to facilitate the collection and reporting of faculty activity data, and has been designed to be highly flexible in the ways in which it can do this. The information in this chapter will assist you in customizing Activity Insight to capture the information necessary to meet your campus's unique needs.

DigitalMeasures Long-Term, Partnership Approach

The implementation and maintenance of Activity Insight is an iterative process that can accommodate changes over time. However, it is also important to ensure that your system is designed with long-term use and consistency in mind.

Digital Measures is glad to discuss and understand your needs, and to assist in brainstorming solutions. With experience conducting countless Activity Insight implementations, the Digital Measures team will be able to help identify the technical implementation of Activity Insight that will best meet your needs.

If you ever have any questions about the impact a certain choice like selecting the Single Campus Instrument configuration or configuring **Editable User Reference** will have long-term, please submit a General work request or contact your Client Manager.

The ActivityInsight Base Instrument

Upon logging into Activity Insight you will see a set of preconfigured screens. These screens have been copied from the Activity Insight Base Instrument, which has been designed to incorporate numerous best practices regarding data collection. It includes the most sought-after data elements identified by Digital Measures clients over time, and is regularly augmented as new functionality is developed and new client needs are identified. This Base Instrument provides a great starting point that may be customized by each client to meet their data collection needs.

One Screen Per Type of Activity

You will notice as you review the Base Instrument that the screens reflect individual activity types. Within each of these screens are fields that are relevant to the activity at hand. One of the design principles reflected within Activity Insight is that data should only need to be collected once, but it can be used to feed many different reports. This is why Activity Insight captures activity data in this granular, flexible fashion – to ensure that your data can be pulled into any reports you want to generate.

Continuous Data Entry

Activity Insight is designed for *continuous data entry*, meaning that activities are the unit of analysis in the system as opposed to, for example, academic years.

With continuous data entry, activities that span multiple years only need to be entered once, rather than yearly, no matter how many years the activity spans. This is because start and end dates are associated with activities. This means you should not create separate records for each year that an activity spans. Reentering data each year for activities that span multiple years makes it impossible, at worst, and difficult or potentially inaccurate, at best, to properly account for an activity that spans multiple years.

For example, if a user enters two records, one per academic year, for a committee membership that he or she held, there is no definitive way to show that these two records were actually the same activity that spanned multiple years. While users can run an annual report showing each item once per year, it is not accurate when counting, for example, the number of unique committee memberships held by a user in a five-year period.

Policy Against Storing Highly Sensitive Data

Despite the large degree of flexibility in data collection and customization, there are a few items Digital Measures will not store in Activity Insight. The company takes seriously its commitment to respect and protect the privacy of client data. Thus, a policy exists that prevents data deemed to be sensitive personally identifiable information from being stored. This includes:

- National identification numbers, such as social security and passport numbers
- State identification numbers
- Driver's license numbers
- Health insurance policy ID numbers
- Financial account numbers
- Work permits

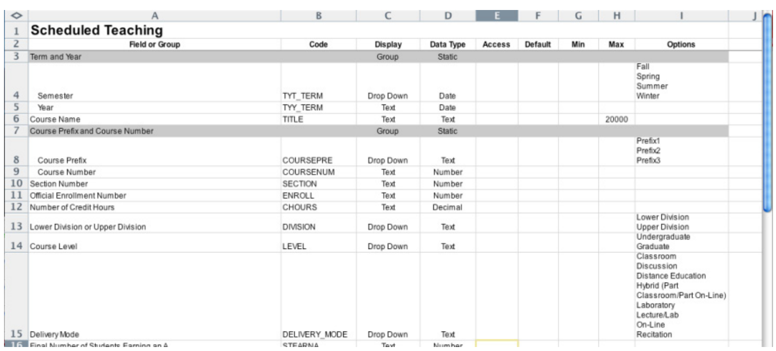
In addition, file upload fields in Activity Insight may not be used to store documents or images containing any items in the above categories.

Configuration Report

When you want to customize Activity Insight to collect new information, you may find it useful to download the current Configuration Report for your instance of Activity Insight. The Configuration Report is a Microsoft Excel spreadsheet showing the structure of your Activity Insight instrument, with the details of the input fields for each screen on a separate worksheet.

Use the current Configuration Report to detail the customizations you want made to Activity Insight to ensure each change you request is consistent with the current structure of your Activity Insight instrument. Color-coding your edits is strongly recommended. For example, you could use green to indicate new fields and/or screens to be added, blue to indicate existing screens or fields that you have edited some way (e.g. moved to a different location, changed the wording on the label, changed the type of the field, added an access setting, etc.), and red to indicate screens or fields that should be deleted. Please choose colors that are easily distinguishable from black, or use background cell colors instead of text colors to make changes more noticeable. It is also helpful to include a "Changes Requested" column on each tab of the Configuration Report workbook. In this column you can explain the exact changes that should be made to the field in question.

Attach your marked-up copy of the Configuration Report to your Screen Revision(s) work request. Then once the revisions are complete, retrieve a fresh copy of the Configuration Report and confirm that the new structure reflects the changes as expected.



	A	B	C	D	E	F	G	H	I
1	Scheduled Teaching								
2	Field or Group	Code	Display	Data Type	Access	Default	Min	Max	Options
3	Term and Year		Group	Static					
4	Semester	TYT_TERM	Drop Down	Date					Fall Spring Summer Winter
5	Year	TYY_TERM	Text	Date					
6	Course Name	TITLE	Text	Text				20000	
7	Course Prefix and Course Number		Group	Static					
8	Course Prefix	COURSEPRE	Drop Down	Text					Prefix1 Prefix2 Prefix3
9	Course Number	COURSENUM	Text	Number					
10	Section Number	SECTION	Text	Number					
11	Official Enrollment Number	ENROLL	Text	Number					
12	Number of Credit Hours	CHOURS	Text	Decimal					
13	Lower Division or Upper Division	DIVISION	Drop Down	Text					Lower Division Upper Division
14	Course Level	LEVEL	Drop Down	Text					Undergraduate Graduate
15	Delivery Mode	DELIVERY_MODE	Drop Down	Text					Classroom Discussion Distance Education Hybrid (Part Classroom/Part On-Line) Laboratory Lecture/Lab On-Line Recitation
16	Final Number of Students Earning an A	STEARNA	Text	Number					

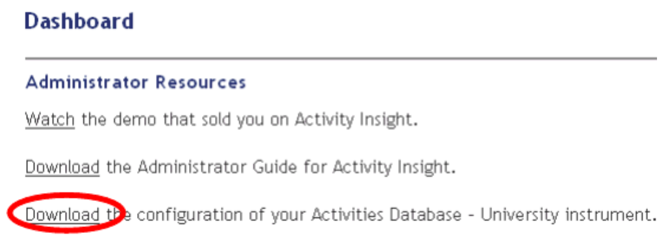
*The Configuration Report, showing the worksheet for the **Scheduled Teaching** screen.*

- **To download your current Configuration Report:**

  1 In Activity Insight, select **Dashboard** in the Left-Hand Menu.

  2 In the **Dashboard** page, select **Download the configuration**.

  3 If prompted, either open the file with Microsoft Excel or save it to your hard disk for later viewing.



*The **Dashboard**, showing where to retrieve the Configuration Report.*

> **Note:** If you will be importing data from other campus systems into Activity Insight, the Configuration Report is a great starting point for building those import files. Use the "Field or Group" or "Code" column of the Configuration Report to create the header row of your import file. Then use the "Data Type" and "Options" columns to see if the destination fields in Activity Insight expect the incoming data in a particular format.

Screen Types

There are two types of screens in which to enter data in Activity Insight: static and dynamic.

Static

Static screens collect persistent data, which are data that are fixed and not likely to be modified, and for which any incremental modifications do not need to be tracked over time. Only one record can be entered on a static screen. By default, there are two static screens in Activity Insight: **Personal and Contact Information** and **Administrative Data-Permanent**.

Dynamic

Dynamic screens collect data that are asynchronously changed as further updates to the information become available. Dynamic data are distinguished by continuous activity or change that is tracked over time. Multiple records can be created on a dynamic screen.

Summary Screens

When you select a dynamic screen from the Main Menu of the **Manage Your Activities** or **Manage Data** utilities, a summary screen is displayed that shows all the records entered for the user on that screen. Summary screens display records in chronological, alphabetical, descending order, based on the record's end date, beginning date, and summary screen text. This is true regardless of which dates, if any, are actually visible on the summary screen. Records without dates are listed at the top of the summary screen in alphabetical order. For more information about record dates, see "Dates" in *Chapter 6: Customizing Screens and Fields.*

Fields can be added to and removed from the display on summary screens. However, only the criteria outlined above can be used for sorting.

Each line on the summary screen display is truncated to sixty characters. The truncation technically occurs to summary display *lines*, not to fields. This is an important distinction if multiple fields are displayed on the same line. If a field contains a line break, the line break is carried through to the summary screen and the truncation occurs *after* the line break has been taken into account.

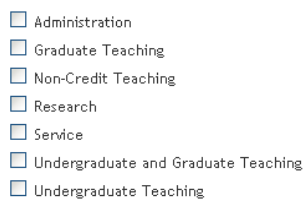
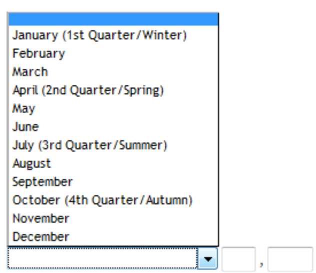
The availability of the **Add a New Item**, **Edit**, **Copy** and **Delete** functions on the Summary Screen is governed by whether there are one or more read-only, hidden, or locked fields on the screen, and whether an override has been put in place to allow users to add and delete records. For more information, see "Screen, Field and Data Settings" in *Chapter 6: Customizing Screens and Fields.*

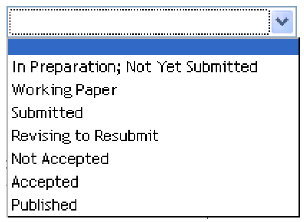
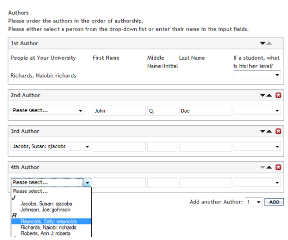
Activity Insight does not currently support the ability to add text to summary screens.

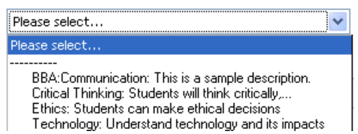
Field Types

The following table shows the available field types in Activity Insight. Help Buttons, which open a pop-up window with content written by your institution, can be added to any field. Help Buttons cannot be added to the Main Menu or to summary screens.

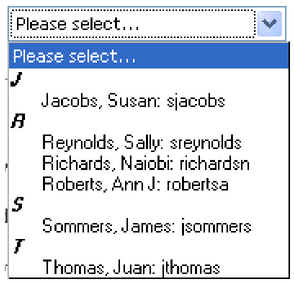
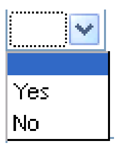
Table 2: Field Types with Descriptions

Type	Data Stored/Purpose	Usage Examples
Checkboxes 	Boxes that are selected or cleared to turn on or off a value. More than one value can be selected. For more information, see "Checkboxes" in *Chapter 6: Customizing Screens and Fields.*	▪ Classifications ▪ Area(s) of expertise
Checkbox, Single 	A box that is selected or cleared to turn on or off a value. For more information, see "Checkboxes" in *Chapter 6: Customizing Screens and Fields.*	▪ Confirm your record ▪ Display in directory
Date 	A combination of month, day, term, or year fields. The Date field enables users to enter a date by picking the month or term from a drop-down list, and/or typing the day and year into a text box with validation rules. For more information, see "Dates" in *Chapter 6: Customizing Screens and Fields.*	▪ Date of hire ▪ Date of tenure ▪ Date published

Type		Data Stored/Purpose	Usage Examples
Drop-Down List		List of predefined values from which users can select only one value. The drop-down list ensures data integrity and consistency, and limits input values to those designated by your campus. For more information, see "Checkboxes" in *Chapter 6: Customizing Screens and Fields.*	▪ Department ▪ Classification ▪ Position/rank ▪ Academic term ▪ Contribution type
Dynamic Sub-Answer (DSA)		Enables user to create multiple records within a record. Enables users to associate one record with multiple sub-records For more information, see "Dynamic Sub-Answers (DSAs)" in *Chapter 6: Customizing Screens and Fields.*	▪ Associating multiple contributors with intellectual contribution records ▪ Associating multiple intellectual contributions with grant records
Numeric		Numerical values with validation rules: integers, decimals, percentages or currency.	▪ Credit hours ▪ Number of undergraduate students advised ▪ Teaching workload percentage

Type		Data Stored/Purpose	Usage Examples
Phone Number		Stores integers in a phone number format.	▪ Office phone ▪ Fax
Record Reference		List of records entered by the user in another screen from which the user can select only one value. You can choose to display values from one or more fields within this reference drop-down field. Creates an association between two records. For more information, see “Record Reference” in *Chapter 6: Customizing Screens and Fields.*	▪ Associate users’ intellectual contributions with presentations ▪ Associate user-defined goals with objectives
Store File		Store a file to supplement activity data. Creates a central repository of files related to teaching, research and service.	▪ Photographs ▪ Syllabi ▪ Full-texts of intellectual contributions ▪ Presentation files

Type	Data Stored/Purpose	Usage Examples
Text Area 	Multiple lines of up to 20,000 characters.	▪ Brief biography ▪ Description of pedagogical innovations ▪ Brief description of responsibilities
Text Box 	Single line of characters.	▪ Title of article ▪ Course name ▪ Sponsoring organization
Time 	Stores integers in a time format.	▪ Course time ▪ Office hours

Type		Data Stored/Purpose	Usage Examples
User Reference		Drop-down list of your instrument's user accounts. Should specify whether the creator of the record or all users associated with the record should have the ability to edit/delete the record. For additional information, see "User Reference" in *Chapter 6: Customizing Screens and Fields.*	▪ Authors ▪ Presenters ▪ Instructors ▪ Inventors
Yes/No		Drop-down list with yes and no values. Used to answer a yes/no field.	▪ Tenure track ▪ Graduate faculty ▪ On leave
URL		Text box preceded with `http://`. Used to enter a web address.	▪ Personal website ▪ Publication reference ▪ MS SharePoint reference

Checkboxes and Drop-Down Lists

Deleting or renaming values of checkboxes and drop-down lists will affect existing records in Activity Insight that contain the value being deleted or renamed. When submitting Screen Revision(s) work requests for these changes, be sure to include instructions on how to handle the existing data that will be affected by the change. Values that are removed can be mapped to other values or the stored value can be cleared.

Whenever a checkbox list contains greater than seven values, it will be displayed as a scrolling checkbox field.

Example of a scrolling checkbox field.

Dates

Date fields can be comprised of a combination a month, day, term, or year elements. For example, if you would only like to collect a Year for a certain screen, you can remove the Month and Day elements of the Date field. If a Date field is required to be filled in order to save a record, each required element of the Date field must contain a value.

Activity Insight translates term and academic year information into a series of date ranges. The following terms/academic years correspond with the respective date ranges.

- **Winter Term**: January 1 - January 14
- **Spring Term**: January 15 - April 30
- **Summer Term**: May 15 - August 31
- **Fall Term**: September 1 - December 31
- **Academic Year**: September 1 - August 31

The date ranges associated with the terms above cannot be customized. However, you can narrow the date range to encompass only the term(s)/academic year(s) you wish to display on your report. For example, running a report with a start date of September 1 and an end date of December 31 will return results only for the Fall term of the year selected.

Significant Dates

Date fields in Activity Insight can be designated as either *significant* or *insignificant*. When a user runs a report, a specific date range must be chosen. Significant dates are used to determine if the record will be included on the report. An insignificant date is simply another data element and is not used to determine whether a record is included on a report.

Multiple significant dates may exist on a screen and may consist of any combination of date formats such as month, day, or year. The earliest date serves as the beginning date of the record. The latest date serves as the end date of the record.

If exactly two significant dates appear on a screen, and none of these dates are within a dynamic sub-answer (DSA) (see below), Activity Insight determines the date of the record as follows:

- If both the first and second dates have values, Activity Insight uses the first and second dates as the start and end dates of the record, respectively.
- If the first date has no value and the second date has a value, Activity Insight uses the second date as both the start and end date of the record.
- If the first date has a value and the second date has no value, Activity Insight uses the first date as the start date and uses a null (infinite) value as the end date.

Significant dates must appear in ascending, chronological order on a screen. For example, a start date must always precede an end date, or a date submitted must always precede a date published.

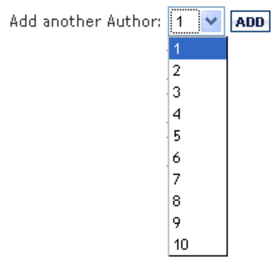
If a DSA contains a single date field, and there are no significant dates elsewhere on the screen, that field can be made significant. For single date fields within DSAs, Activity Insight will scan all rows and use the minimum and maximum date values, regardless of the order in which they have been entered, as the respective start and end dates of the record.

If a DSA contains multiple date fields like Start Date and End Date, however, these date fields should not be made significant. The validation that ensures date fields are entered in chronological order, as well as the rules for calculating the record dates, are too restrictive to permit this configuration.

> **Note:** DSA rows do not automatically sort in chronological order, but instead appear in the order in which they are entered. If a user should be able to adjust the order in which DSA rows appear Significant Ordering should be enabled, which will allow DSA rows to be reordered manually. See below for more information on Significant Ordering.

Dynamic Sub-Answers (DSAs)

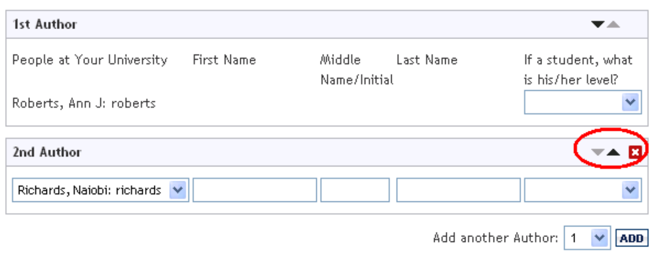
A dynamic sub-answer (DSA) is a record within a record. An example in Activity Insight is the Authors DSA on the **Intellectual Contributions** screen, which enables a user to associate multiple authors with a single intellectual contribution record. Access, descriptors, and restrictions can be applied to both fields and data in a DSA. Users can select how many DSA records to create at one time by selecting the number of records they would like to enter from the drop-down list in the lower right corner of the DSA section.



Adding multiple DSA rows.

Significant Ordering

Users can change the order in which records in a DSA appear. When significant ordering is enabled and multiple DSA records exist, arrows appear to the right of each DSA record to enable users to change the order of the DSA records.



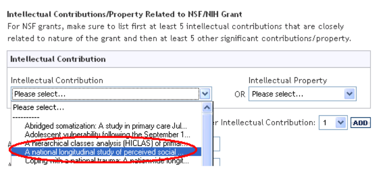
Significant ordering enabled for a DSA.

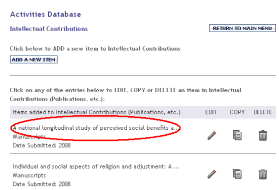
DSA records cannot be automatically sorted. If the order of DSA records is relevant, you will want to enable significant ordering. By default, significant ordering is enabled for both the Authors DSA on the **Intellectual Contributions** screen and the Presenters DSA on the **Presentations** screen.

The ordinal values of DSA records are displayed in ad hoc reports when significant ordering is enabled.

Record Reference

Record reference fields are used to associate one record with another record. For example, when creating a record for a new grant on the **Contracts, Grants and Sponsored Research** screen, you may want to associate records on the **Intellectual Contribution** screen with the grant record to show what contributions were supported by the grant. This could be accomplished by creating a record reference field on the **Contracts, Grants and Sponsored Research** screen that references the user's **Intellectual Contribution** titles.





A record reference field.

Store File

Files can be associated with records in Activity Insight. This enables your campus to report activity data and supporting documentation together to provide a more complete picture of the activities in which your faculty members are involved.

By default, Store File fields are on the following screens in Activity Insight:

- Personal and Contact Information
- Education
- Scheduled Teaching
- Artistic and Professional Performances and Exhibits
- Contracts, Fellowships, Grants and Sponsored Research
- Intellectual Contributions
- Presentations

Store File fields can be added or removed to align with your campus' needs for documentation to supplement faculty activity data. To make changes to the Store File fields in Activity Insight, simply submit Screen Revision(s) work request noting the modifications that should be made.

File Type Restrictions

Digital Measures does not, by default, place any restrictions on the types of files that can be stored. However, specific file types may be either blocked or allowed. For example, you could choose to block just MP3 and EXE files or allow only DOC, DOCX and PDF files. To configure file restrictions for Activity Insight, submit a General work request noting the requirements.

> **Note:** File type restrictions apply to all screens in your data collection instrument; they cannot be implemented on a screen-by-screen basis.

Maximum File Size

The default maximum file size is 10MB per file. However, you can increase the file size allowed up to 50MB. To request an increase in the file size allowed, submit a General work request.

Retrieving Stored Files

Once a file has been stored, authorized users can retrieve it in a variety of ways.

- **Retrieve a file from the data collection screen where the file was stored.** To do this, all a user needs to do is navigate to the record where the file was stored and click **Download**. A user will always be able to access his or her own files this way. In addition, a user in a security role with access to the **Manage Data** utility will be able to retrieve the files stored for the users within the scope of his security.
- **Retrieve a file through a link in an ad hoc report.** Links to any files stored through a given Store File field will be included in an ad hoc report, provided that the field is included in those selected for the report in Step 3: **Select the data to include** of **Run Ad Hoc Reports**. If the Store File field is hidden, the field and links will only be included in an ad hoc report if the user has the **Show Hidden Data** option enabled for the security role that grants him or her access to **Run Ad Hoc Reports**.

> **Note:** It is possible to disable the inclusion of links to stored files in ad hoc reports. If you do this, the ad hoc report will still display the file name of the file stored, but will not include a retrieval link. To have this feature disabled submit a General work request noting this.

- **Retrieve a file through a link in a custom report.** A custom report can be built to include links to files stored through specific Store File fields like "Full-text of this item". If a custom report has been built this way, a link to each file stored through that field by a user will be included whenever the report is run for that user's data. To request that a custom report be updated to include a link to files stored through a Store File field, submit a Report Revision(s) work request noting where you would like this link to be displayed in your report.

> **Note:** At the present time it is not possible to include the content of the stored file, like a photograph, directly in the body of a report.

Access to Stored Files

A user's Activity Insight security assignment governs the files to which he or she has access. In order to verify that a user retrieving a file currently has a security assignment that grants access to the file requested, he or she will need to be logged in. If the user is not logged in, he or she will be asked to authenticate.

Here are some details on the permissions that can grant a user access to a stored file.

Table 3: Access to Stored Files

Permission	Description of File Access
Manage Your Activities	Grants a user access to his or her own files.
Manage Data	Grants a user access to the files stored for the users within his or her scope of security. The scope could grant access to one or more individuals, departments, colleges, or all users for your campus.
Run Ad Hoc Reports	Grants a user access to the files stored for users within his or her scope of security.
Run Custom Reports	Grants a user access to the files specifically referenced in the custom reports to which the user has access, for the users within his or her scope of security.

If you are interested in making files stored through Activity Insight publicly accessible, consider putting the **Mirrored Files** feature in place. For more information, see “Mirrored Files” in *Chapter 10: Additional Features.*

User Reference

A user reference field is a drop-down list of your instrument's user accounts. User reference fields are used to associate records with users. Records with which a user has been associated are visible to that user. An example of **User Reference** usage in Activity Insight is the Authors DSA on the **Intellectual Contributions** screen, which enables a user to associate multiple authors with a single intellectual contribution record.

User reference fields will always display the name of the user followed by the individual portion of the user's email address, which is the set of characters before the "@" symbol.

Important: When data are imported from other systems, it is not always possible to populate user reference fields since the ability to do this depends on the way in which the name data is provided. In order to populate a user reference field, the import file must contain one or more columns of Activity Insight usernames or unique user identifiers. If the import file contains name fields only, the user reference question will be left empty and the name data will be stored within the corresponding text fields. If a user subsequently tries to edit and save such a record, they will be forced to select their name from a user reference field and delete the text entry of their name.

User reference fields in Activity Insight can be configured as either non-editable or editable. Non-editable is the default.

Non-Editable User Reference (Default)

By default, only the user who created a record is able to edit that record.

Editable User Reference

User Reference can also be configured so all users associated with a record can edit the record. With **Editable User Reference** configured, collaborators will be able to update the records to which they are associated. However, only the record's creator will be able to delete the record, or remove him or herself from the record if record ownership should shift.

Warning: Screens with **Editable User Reference** fields cannot contain restricted fields, as different users may have different restrictions. Restricted fields are fields that only display for specific colleges or departments.

Note: **Editable vs. Non-Editable User Reference** is set once for your entire data collection instrument; it cannot be set on a per-screen or per-field basis.

Disabling User Reference Linking

The linking feature of user reference fields can be disabled at the field level so users are not automatically associated with records. If **User Reference** is disabled, each user will need to enter his or her own records. For example, if two users co-author an intellectual contribution, each user will need to enter separate intellectual contribution records in Activity Insight. It will appear as though these are two separate intellectual contributions and it will not be possible for Activity Insight to recognize these two records as the same intellectual contribution. This will result in this intellectual contribution being counted twice in reports. Because of the resulting decreased flexibility in counting users' activities, disabling user reference fields is not recommended.

> **Warning:** When an existing user reference field is disabled, records are *not* automatically created for the referenced users. If you would like records to be created for each referenced user, it should be specifically stated in the Screen Revision(s) work request that is submitted.

Auto-Population

If only one DSA section with a user reference field exists on a screen, Activity Insight will auto-populate the user reference field with the name of the user on whose behalf the record is created. If more than one DSA section with a user reference field exists on a screen, neither user reference field will be auto-populated with the name of the user on whose behalf the record is created. **User Reference** auto-population does not occur in this instance, as Activity Insight cannot know which DSA to auto-populate. However, the name of the user on whose behalf the record was created must be selected in at least one DSA before the record can be saved. For example, if the **Intellectual Contributions** screen contains separate authors and editors DSAs with user reference fields, the user on whose behalf the record was created must be selected as either an author or an editor.

The auto-population feature can be disabled. However, one significant drawback of disabling auto-population is that users will have to select their own name from the user reference field or type it in for each record they enter. Many users will fail to do so, resulting in incomplete records that list only collaborators or no one at all. Instructional text can be added to the screen, but this does not ensure that users will comply. The user reference field cannot be made required, as doing so would prevent users from saving records when a collaborator does not have a user account. Because disabling auto-population will have a negative impact on more users than it will benefit, it is not recommended.

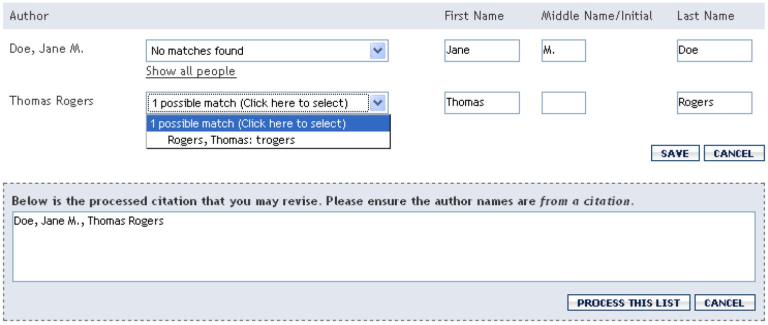
> **Note**: If a user, User A, is linked to a shared record through a user reference field but does not want that shared activity to appear on his or her reports, a link is provided on the summary screen that allows User A to contact the record's owner, User B. User A can then ask User B to deselect his or her name from the drop-down list and instead type his or her name into the input fields. The item will no longer show up for User A, but it will show up for User B who entered it.
>
> Alternatively, you could disable the linking functionality that shares a record with all users to whom it is linked. This is done through the user reference drop-down. Of course, this has trade-offs, such as requiring each person involved in an activity to enter that activity individually and preventing simple unique counts of activity records in department-, college- and campus-level reports.

Collaborator Name Parsing

Collaborator Name Parsing is functionality that enables a user to paste a list of names from a citation into a text box, and then divides this list of names into individual DSA records. Activity Insight will populate user reference fields from the names provided when a potential user account match is found. Users have the ability to modify the resulting DSA records before they are saved.

With **Collaborator Name Parsing** in place, users can select either to add a list of collaborators or select the number of DSA records to be manually entered.

To put **Collaborator Name Parsing** in place for all screens that contain a user reference field within a DSA, submit a Screen Revision(s) work request.



*The **Collaborator Name Parsing** screen.*

> **Note:** Collaborator DSA records added using **Collaborator Name Parsing** will never overwrite existing DSA records; they will be inserted after the Collaborator DSA records that already exist for the record.

Screen, Field and Data Settings

Access

The following table shows the types of access that can be applied to screens, fields, and/or data in Activity Insight.

Each access type is mutually exclusive. For example, a screen cannot be both hidden and locked.

If there is a conflict between screen, field, and data access, the more restrictive access is enforced. For example, if a screen is locked and a specific field on that screen is hidden, that field will be locked.

Table 4: Screen, Field and Data Access, from least to most restrictive

Type	Capability	Usage Example
None (Default)	Users with permission can view, add, edit, and delete data.	▪ Intellectual contribution titles ▪ Description of accomplishments ▪ Teaching interests ▪ Research interests
Read-Only	Users with permission can view and run reports on data. Users with **Manage Data** permission can also edit data.	▪ Date of hire ▪ Date of tenure ▪ Scheduled teaching data ▪ Course evaluation data
Hidden	Users with **Manage Data** permission can view and edit data. Users with **Run Ad Hoc Reports** can by default run ad hoc reports containing hidden data. Hidden fields can be suppressed in ad hoc reports by removing **Show Hidden Data** from the security role.	▪ Source of Imported Data fields ▪ Confidential/sensitive data
Locked	Users with permission can view and run reports on data. No one can edit/delete data.	▪ Typically used when the field is populated with data from another source, such as scheduled teaching data from your course management system or administrative data from your human resources system like Banner, Datatel, or PeopleSoft. This ensures that any data updates are made to the original source of the data, not in Activity Insight.

Read-only, hidden, and locked screens and fields are still visible to users with **Manage Data** access. For this reason, it is recommended that you delete any fields you do not intend to use rather than changing their access type. Screens and fields can always be added back at a later date, if needed.

In addition, by default, users cannot add or delete records on a screen that has one or more read-only, hidden, or locked fields. Digital Measures can override the default behavior that prevents a user from adding or deleting records when a screen has one or more read-only, hidden, or locked fields. With the override in place, users are able to add and delete records on screens with one or more read-only, hidden, or locked fields. The override only changes a user's ability to add records to or delete records from a screen; it does not change their access to individual fields on the screen. The override can be put in place for all users or only users with the **Manage Data** permission.

> **Warning:** The override also enables users to *delete* records created through a data import. If you intend to import data for a screen, **it is strongly recommended that you do not put the override in place**.

When a screen contains one or more read-only, hidden, or locked fields, a standard system note will be inserted at the top of the screen to alert the user that he or she may not have access to view or edit one or more fields on that screen. This is intended to encourage caution in handling these records, as there may be information contained within them that are necessary for reporting but are not currently visible to all users. Furthermore, this note provides the user with a point of contact – their Activity Insight Administrator – in the event that he or she is unable to update the record but needs to change a value stored. While this note cannot be customized, instructional text can be added to the screen if further clarification of the read-only, hidden, or locked fields is needed.

Descriptors

The following table shows the types of descriptors that can be applied to screens and fields in Activity Insight.

Unlike access types, descriptor types are *not* mutually exclusive. For example, a field can be both publicly available and required.

> **Warning:** Use required fields judiciously. A user will not be able to save a record if the required data are not available when the record is created.

Table 5: Screen and Field Descriptors

Type	Description	Usage Example
Default	A value that is used when no other value is selected.	▪ Questions for which the answer is the same for most users
Maximum	Highest numeric value that can be entered by a user.	▪ Day fields ▪ Credit hours
Minimum	Lowest numeric value that can be entered by a user.	▪ Day fields ▪ Credit hours
Pop-Up	A window, containing text and/or fields, that appears over the window in use.	▪ Dynamic sub-answers (DSAs) with many fields
Publicly Available	Notifies the user that the data may be made available outside of Activity Insight. Data is not automatically made publicly available. It serves as an indicator of what the campus intends to make publicly available outside of Activity Insight. Denoted on the screen by a red letter P.	▪ Data that may be displayed on a public website using **Web Services**
Required	Data must be entered in the field before a record can be saved. Denoted on the screen by a red asterisk (*).	▪ Title ▪ Contribution type ▪ Current status

Restrictions

Restrictions enable you to restrict screens, fields, and reports to users associated with specific colleges. Restrictions can be useful for collecting and reporting college-specific data, such as professional accreditation reporting, that users associated with other colleges do not need to provide.

Restrictions can be used to add or remove access to screens and fields. The ability to use restrictions to provide variations on the same screens and fields to different colleges is contingent upon having selected a single campus instrument in which the customizations are applied based on a user's primary unit appointment. See "Single Campus Instrument (only primary unit customizations visible)" in *Chapter 1: Introduction* for more information. With this configuration, each college can not only restrict access to specific screens and fields, but can also create college-specific versions of questions. For example, each college could create its own version of the Course Prefix field with its college-specific values.

For "Single Campus Instrument" configurations, however, restrictions can never result in multiple versions of the same question, as this would cause confusion to a user associated with both colleges. Multiple versions of the same question would present the user with a confusing data collection structure since these questions would be separate but collect essentially identical data. Furthermore, this would also cause ambiguity in reporting. For the "Single Campus Instrument" configuration, colleges must be in complete agreement with regard to data that are collected for more than one unit. See "Single Campus Instrument" in *Chapter 1: Introduction* for more information.

Important: A user's access to data collection screens and fields restricted by college is determined by the user's college assignment(s) on his or her most recent **Yearly Data** record. If a user's college appointments change over time, the restricted screens and fields to which he or she has access will change accordingly.

Chapter 7: Customizing Reports

Overview of Report Customization

You and your colleagues will likely identify a number of reporting needs that Activity Insight will fill. It is useful to start integrating reports into your system right away since these reports will, to a large extent, inform which data elements you will need to collect and how they should be captured.

To start out, select a few key reports that will meet the reporting needs of a variety of stakeholders. Building these into your system in preparation for the initial launch will ensure that everyone benefits from Activity Insight right away. This also helps to stimulate a holistic approach to implementation that involves customizing your system to collect data for multiple purposes.

Base Reports

You will find some custom reports preconfigured for you in Activity Insight. These include some administrative and screen-specific reports as well as a vita. These reports are intended to be examples of the types that can be built from Activity Insight, and while they pull data from the system in a useful way, you will likely want to augment or replace these reports with ones that more closely fit your campus's needs.

In addition to these reports, Digital Measures can put in place a handful of pre-constructed reports for common audiences. Base reports geared toward AACSB, ABET, NCATE and SACS accreditation and biographical sketch base reports for the National Institutes of Health (NIH) and National Science Foundation (NSF) are currently available. To request that a set of base reports be put in place, submit a Report Setup work request inquiring about the availability of the report you need.

Of course you can request that new custom reports be built to meet accreditation and other reporting needs at any time. This chapter will guide you through creating custom reports in Activity Insight.

Building New Custom Reports

Once your campus becomes familiar with Activity Insight and its reports, you will likely come up with new reports you would like built. To build new reports into Activity Insight, you will need to create a Report Setup work request and include a sample of the report in Microsoft Word or Excel or Rich Text Format showing how you would like it built.

Although you can add new reports at any time, adding new reports may require new data fields for activity entries. Users will then need to backfill every affected entry for all years to be included in the report, a process that will require your users to revisit their completed work. Collecting a complete set of reports up front enables Digital Measures to ensure that your instance of Activity Insight reflects the requirements of the reports your campus needs to create.

Each new report should be submitted as a separate Report Setup work request Create a sample mock-up report in Microsoft Word or Excel for all reports that do not currently exist but that you want included in Activity Insight. See "Submitting Report Setup Work Requests" in *Chapter 9: Managing Work Requests* for more information.

Creating a Sample Mock-Up Report

You will need to create a sample mock-up report in Microsoft Word or Excel or Rich Text Format for all reports that do not currently exist but that you want included in Activity Insight. Using an existing report that is already in Activity Insight as a template will simplify this process. Mock-up reports can also be used to indicate changes you would like made to existing reports.

You can view the structure of each report template in Activity Insight on the **Run Custom Reports** page. Simply choose the report you wish to examine, select the **Select Report** button to refresh the page, and then select **Details of how this report is built**. If you are prompted, open or save the file. Each data field is enclosed in square brackets.

Contracts, Grants and Sponsored Research
Your Organization
Report Start Date - Report End Date

Department

[Last Name], [Preferred First Name] [Initial of: [Middle Name]] ([Faculty/Staff Rank])

*Screen: **Contracts, Grants and Sponsored Research***
Records: All Records

Current Status
[list of [**Investigators**] as "[Last Name], [First Name] [Middle Name/Initial] ([Role])"], "[Contract/Grant/Research Title]," Sponsored by [Sponsoring Organization], [Awarding Organization Is], $[Amount]. ([Start Month of Funding Start Day of Funding, Start Year of Funding - End Month of Funding End Day of Funding, End Year of Funding]).

The Contracts, Grants and Sponsored Research report template.

Submitting Reports

Submit a separate Report Setup work request to Digital Measures for each report you need built. The reports you submit should be in Microsoft Word or Excel, or Rich Text Format. Each report should be accompanied by additional information.

- **Who will run this report?** This is typically one or more security roles for one or more units – for example, the College Limited Administrator security role for the College of Education, or Faculty security role for the entire campus. In Activity Insight, reports are assigned to security roles rather than specific users.

> **Note:** If your current set of available security roles does not contain one that meets the needs you have for a report, explain those needs as part of the Report Setup work request and Digital Measures will make a recommendations on how to meet them.

- **What should the report be named?** Indicate the name by which you would like the report to appear on your **Run Custom Reports** drop-down list. For example, should your annual report be labeled Faculty Activity Report, Annual Activity Report, or Faculty Annual Activity Report? Capitalization and punctuation are important.

For detailed instructions for Report Setup work requests, see "Submitting Report Setup Work Requests" in *Chapter 9: Managing Work Requests*.

Chapter 8: Running Reports

Overview of Reporting

Activity Insight provides powerful reporting that is customizable to fit your campus's exact needs. Activity Insight Administrators – at the campus, college and department levels – can generate reports on the activities of the users for whom they have access. Faculty users can generate reports on their own data. With Activity Insight, your campus can easily and quickly run reports for many of its requirements, such as:

- Personnel reviews, including annual activity reports, promotion and tenure documents, and standardized vita
- Planning, including program, departmental and course-embedded assessments, and institutional research and analysis
- Professional and regional accreditation
- Media requests
- System and state reports
- Custom reports created to meet your campus's needs

You can also leverage the **Run Ad Hoc Reports** utility to search and analyze the information your users have stored in Activity Insight to find answers to key campus questions.

Activity Insight provides two methods for generating reports: **Run Ad Hoc Reports** and **Run Custom Reports**.

> **Note:** Both ad hoc and custom reports will only include data stored within Activity Insight. If certain fields or screens do not contain data, a report run for those fields or screens will be blank.

Running Ad Hoc Reports

The **Run Ad Hoc Reports** utility enables you to create reports on the fly from your campus's data, whether campus-wide or on particular colleges/schools, departments, individuals, or groups. You pick what to include in the report: which data, which users, and which dates. Then Activity Insight creates a report customized to your requirements.

Ad hoc reports are often used as a starting point for detailed analysis of the raw data in Activity Insight. Whether this be for comparing a user's records against the criteria of a custom report to verify completeness or troubleshoot an issue, as a starting point for statistical analysis, or as a way to determine which faculty have areas of expertise that qualify them for particular opportunities, an ad hoc report can be flexible enough to meet a wide variety of needs.

If you find yourself repeatedly running the same ad hoc report, consider submitting a Report Setup work request to Digital Measures to create a new report template based on it. See "Submitting Report Setup Work Requests" in *Chapter 9: Managing Work Requests* for more information.

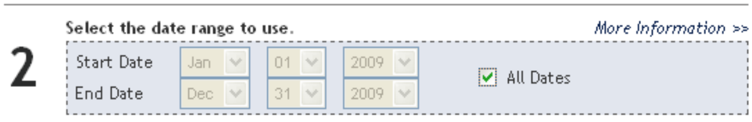
As you consider how you leverage **Run Ad Hoc Reports** on your campus, keep in mind that users will only have access to run reports on screens and fields to which they have access. To provide more flexibility the utility includes an option, **Show Hidden Data**, which enables you to choose whether you want to show or suppress hidden data in **Run Ad Hoc Reports** for a set of users. See "Screen, Field and Data Settings" in *Chapter 6: Customizing Screens and Fields* for more information on hidden fields. For more information on how the **Show Hidden Data** option is applied to this utility, see "Security Role Permissions" in *Chapter 4: Managing Security Roles.*

> **Note:** You can only run reports on users' data for which you have been granted access.

Running an Ad Hoc Report

To run an Ad Hoc Report:

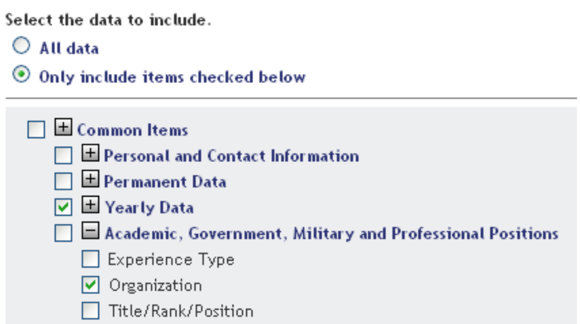
1. In Activity Insight, select **Run Ad Hoc Reports** in the Left-Hand Menu.
2. In step 1, select the instrument from which this report will be generated.
3. Select the range of dates for the information you wish to include in your report. If you wish to include all dates for which you have data, select **All Dates**.



*The **Run Ad Hoc Reports** page showing a selection of All Dates.*

4 The default behavior includes all data in the report. To include a subset of the Activity Insight data, select **Click here** in step 3 to open the **Select data to include** pop-up window.

> **Warning:** If you have disabled pop-ups, please enable them for DigitalMeasures.com. See your web browser's user guide for more information.



*The **Select data to include** pop-up window.*

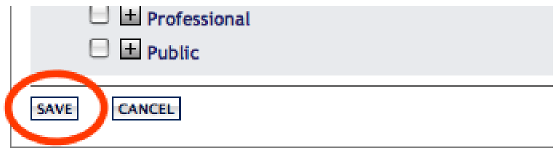
a) In the pop-up window, select **Only include items checked below**.

b) Select the data items you want to include. When you select a top-level item, all items under it are selected.

c) To select a sub-item, select the plus sign (⊞) next to the heading to expand the list, and then select the item. Select the minus sign (⊟) to hide the list again.

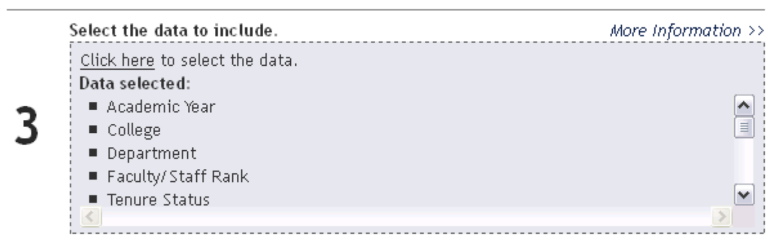
> **Note:** If you have customized screens or fields by unit, you will find these customized screens or fields broken out from the **Common Items** list in the **Select data to include** pop-up. Be sure to review these unit-specific lists if you want to include such screens or fields in your report.

d) Select **Save** at the bottom of the pop-up window to save your selections and return to the **Run Ad Hoc Reports** page.



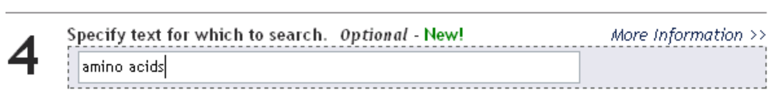
***Select data to include** pop-up window showing Save button.*

5 The **Create New Report** page will display what data are now included in the report under step 3.



*The **Run Ad Hoc Reports** page showing the data selected for a report.*

6 Step 4 enables you to search the data to which you have access for specific terms. Entering terms to search for into the **Specify text for which to search** box will limit the records in your ad hoc report to those containing the search term(s). This step is optional. For more information on searching the data in Activity Insight, see “Searching Using **Run Ad Hoc Reports**” below.



*The **Run Ad Hoc Reports** page showing the search terms “amino acids”.*

7 Select an option for organizing the data in your report.

8 The data in the report can be organized by unit, such as college or department, or by individual. For example, if you select department from the list, the report will be grouped for each department you have selected.

*The **Run Ad Hoc Reports** page showing the selection to organize the report by individual.*

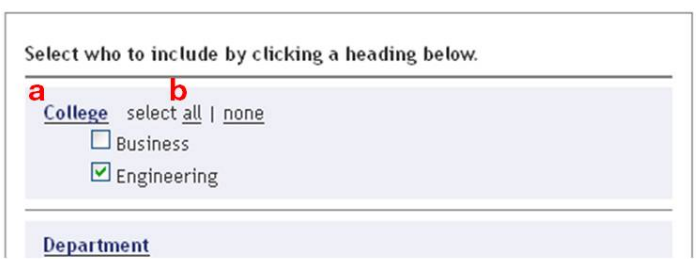
9 By default, all enabled users are included in your report. To limit your report to certain users or groups, select **Click here** in step 6 to open the **Select who to include** pop-up window.

10 You can select to include specific individuals or all individuals in a particular college or department. If colleges, departments, and individual users are selected, these selections function as “and” options, and the report will include all selections made.

11 Activity Insight uses the user attributes - college, department, etc. - in users’ most recent **Administrative Data - Yearly Data** records, including records in the future, to determine who should be included.

> **Note:** If it would be helpful to select users to include in your reports based on an additional user attribute like faculty/staff rank, this can be added. Once added, this will be available as an additional **Select who to include** option in both **Run Ad Hoc Reports** and **Run Custom Reports**. To request this, submit a General work request.

> **Warning:** If you have disabled pop-ups, please enable them for DigitalMeasures.com. See your web browser’s user guide for more information.



Selecting who to include in an ad hoc report.

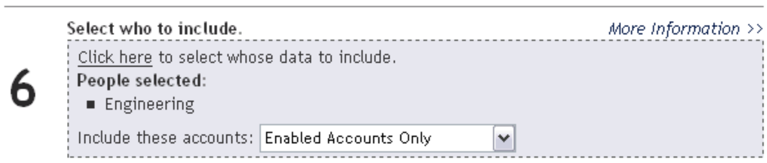
a) Select the headings to expand the groups and then select the ones you want to include in your report.

b) Select **all** next to a heading to select all items under it. Select **none** next to a heading to clear all items under it.

c) When you have completed your selections, select **Save** to save your selections and return to the **Run Ad Hoc Reports** page.

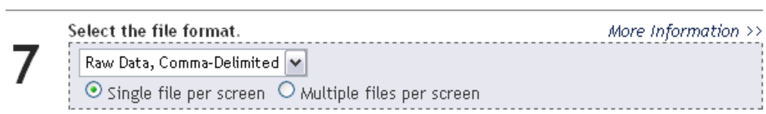
12 Furthermore, you can select to include enabled, disabled, or both enabled and disabled users in your report.

13 The **Run Ad Hoc Reports** page will show the individuals you selected to include in your report under step 6.



*The **Run Ad Hoc Reports** page showing the people selected to include.*

14 Select the file format for your report from the drop-down list in step 7.



*The **Run Ad Hoc Reports** page showing the Raw Data, Comma-Delimited file format, with a single file produced per screen.*

Note: Digital Measures supports several other file formats, including Adobe PDF; HTML; Raw Data, Comma-Delimited; and Raw Data, XML.

> Choosing Raw Data, Comma-Delimited or Raw Data, XML will enable you to use the exported data in other data systems. While the Raw Data, XML format is not very human-readable., using the Raw Data, Comma-Delimited format in conjunction with spreadsheet software such as Microsoft Excel can be a useful way to analyze the data your faculty members have stored for completeness or as part of troubleshooting other reports. Two variations of the Raw Data, Comma-Delimited format are supported – a single file per screen, or multiple files per screen. For screens with Dynamic Sub-Answers (DSAs), like **Intellectual Contributions** with the **Authors** DSA, selecting to generate a single file per screen will result in the DSA data being included as additional columns in the main file for that screen. Selecting to generate multiple files per screen will result in a main file per screen, and one additional file per DSA, containing just the data for that DSA.

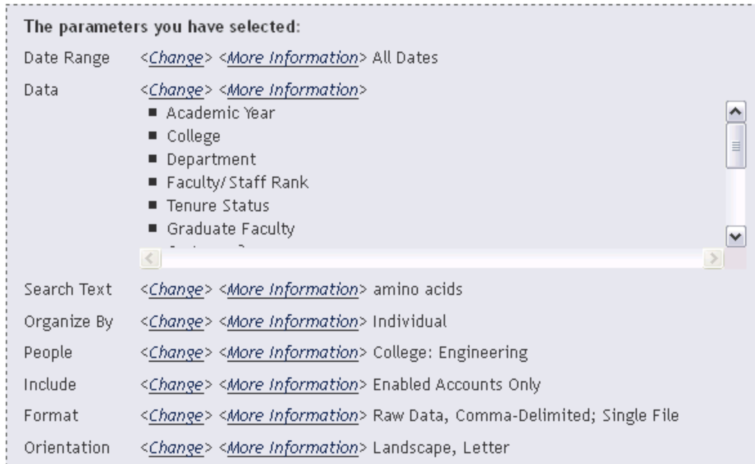
15 Select the paper size and orientation for your report from the drop-down list in step 8.

16 Digital Measures supports several formats, including US Letter and A4 sizes, and portrait and landscape orientations.

> **Note:** You will usually get better results using landscape orientation.

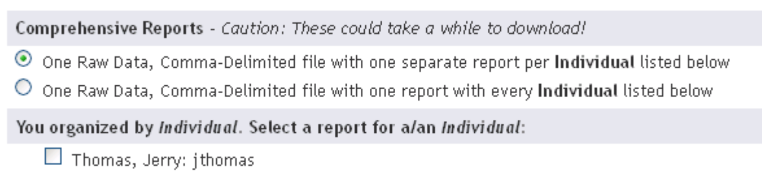
17 Select **Continue** at the bottom of the page.

18 In the next page, review the choices for your report listed in the box at the top. To change one of your choices, select **Change** next to the choice, make your changes in the resulting pop-up, and then select **Save**.



Summary of the parameters selected for your ad hoc report.

19 In the lower sections, choose the report options. The content of these options is based on your prior choices.



Sample report options.

20 Review your selections and select **Build Report**.

21 Activity Insight will build your report and you will be prompted to either open it or save it locally. If you instead receive a warning message stating that you have exceeded the 20,000 record limit, please revise your report selections to include a narrower range of data.

Warning: Changing the data in a report does not change the data inside the Activity Insight instrument. Use **Manage Your Activities** or **Manage Data** to make these changes.

Searching Using Run Ad Hoc Reports

Activity Insight enables you and your users to search the information that is stored within it, including the files users have stored to supplement their activity records. This makes it easy for you and others on campus to quickly answer key questions like

- Who has published recently in a given area?
- Who is best suited to pursue a given grant opportunity or to speak to an industry group or external constituent?
- What types of relationships do our faculty members have with a given organization through their service activities?

This can be accomplished by leveraging the **Specify text for which to search** parameter in **Run Ad Hoc Reports** to find the records that contain specific terms.

The data a user can search is determined by the scope and limitations of the security role that gives the user access to **Run Ad Hoc Reports**. If the user only has the ability to run ad hoc reports for particular users, he or she will only be able to search the information for those same users. If the user's **Run Ad Hoc Reports** permission does not include **Show Hidden Data**, the user will only be able to search fields that are *not* hidden for his or her scope of users.

Applying Criteria to Your Search

To search, just type free-form text into the search box. Alternatively, you can use Boolean logic to be even more specific to obtain the exact information that you need. Details on this logic are readily available to users working with **Run Ad Hoc Reports** through the **More Information** link associated with this step.

Users can also combine their search with criteria selected through the other **Run Ad Hoc Reports** parameters – like a specific date range, specific screens, and specific users – to hone their searches. For example, a user could specify a date range of 2006 and 2009. To search only data from the Intellectual Contributions screen, he or she can limit the search by selecting this screen in **Select data to include.** He or she could then limit the search to the records for users in the Chemistry department through **Select who to include**. Applying such criteria to your search would limit the output to only Intellectual Contribution records between 2006 and 2009 for users in Chemistry that contain the text "amino acids".

Search Results

When you specify search terms, all records that contain the terms that you specify will be returned. It is important to note that search terms apply at a record-level, not a field-level. This means that if you search for "amino acids", all records that contain those words will be returned – even if the terms are not found in the specific fields that are included in the output of your report per your selections in **Select data to include**. For example, if you select to only show publication titles and authors, but the text is found in the field that contains the abstract, the record will still be returned.

The **File Format** and **Orientation and Paper Size** parameters of **Run Ad Hoc Reports** will be used to present the report containing your search results.

Running Custom Reports

Run Custom Reports is a template-based reporting utility that eliminates the drudgery of creating reports by digitizing the process. Digital Measures uses the specific data elements, calculations, and formatting you specify to construct standardized reports which your administrators and faculty can then run on the activity data in your instrument.

On the **Run Custom Reports** page you will find sample reports that come with Activity Insight, as well as custom reports that you have had built.

The following reports are available immediately:

- Academic Degrees Earned
- Awards and Honors
- Birthday Report by Month
- Contracts, Grants and Sponsored Research by Faculty
- Creative Works by Faculty
- Editorial and Review Activities by Faculty
- Faculty/Staff Directory
- General Service by Faculty
- Intellectual Contributions by Faculty
- Presentations by Faculty
- Scheduled Teaching by Faculty
- Vita

All of Activity Insight's report templates can be modified in any way to meet your campus's needs. Of course if you would like an entirely new report to be built, just submit a Report Setup work request with a mock-up and instructions. For more information on Report Setup work requests, see "Submitting Report Setup Work Requests" in *Chapter 9: Managing Work Requests*.

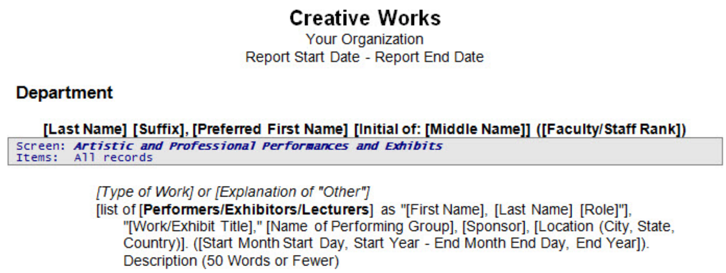
Running a Custom Report

▸ **To run a custom report:**

1. In Activity Insight, select **Run Custom Reports** in the Left-Hand Menu, and select the report you wish to run from the drop-down list in step 1.

   > **Warning:** You must select the **Select Report** button after selecting the report from the drop-down list to refresh the page.

2. To download a report template that shows how the report you selected will be built, select **Details of how this report is built**.



Creative Works
Your Organization
Report Start Date - Report End Date

Department

[Last Name] [Suffix], [Preferred First Name] [Initial of: [Middle Name]] ([Faculty/Staff Rank])
Screen: *Artistic and Professional Performances and Exhibits*
Items: All records

[Type of Work] or [Explanation of "Other"]
[list of **[Performers/Exhibitors/Lecturers]** as "[First Name], [Last Name] [Role]"], "[Work/Exhibit Title]," [Name of Performing Group], [Sponsor], [Location (City, State, Country)]. ([Start Month Start Day, Start Year - End Month End Day, End Year]). Description (50 Words or Fewer)

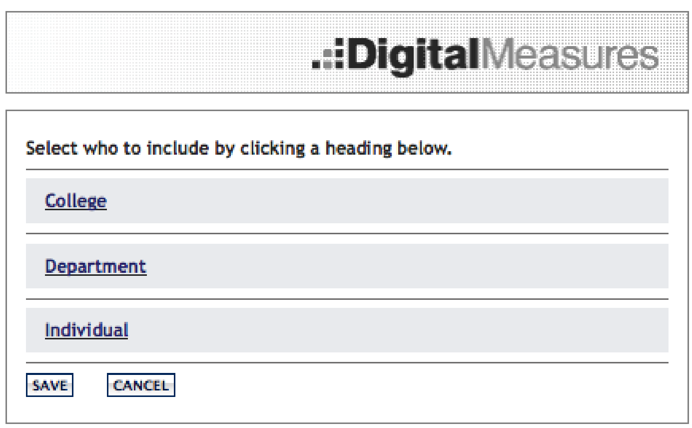
Sample Creative Works report template.

3 Select the date range for the information you wish to include in your report.

4 Activity Insight will warn you if you attempt to create a report with an end date before the report's start date.

5 Activity Insight's default behavior is to include all enabled user accounts in a report. If you would like to limit your report to include only selected users, select **Click here** in step 3 to open the **Select who to include** page in a pop-up window. If colleges, departments, and individual users are selected, these selections function as "and" options and the report will include all selections made.

6 Activity Insight uses the user attributes - college, department, etc. - in users' most recent Administrative Data - Yearly Data records, including records in the future, to determine who should be included.



Pop-up window to select particular users accounts to include in a report.

> **Note:** If it would be helpful to select users to include in your reports based on an additional user attribute like faculty/staff rank, this can be added. Once added, this will be available as an additional **Select who to include** option in both **Run Ad Hoc Reports** and **Run Custom Reports**. To request this, submit a General work request.

> **Warning:** Changing the data in a report does not change the data inside Activity Insight. Use **Manage Your Activities** or **Manage Data** to make these changes.

a) Select the headings to show or hide the groups and then select the ones you want to include in your report.

b) Select **all** next to a heading to select all items under it. Select **none** next to a heading to clear all items under it.

c) When you have completed your selections, select **Save** at the bottom of the page to save your selections and return to the **Create a Report** page.

7 Further, you can select to include enabled, disabled, or both enabled and disabled users in your report.

8 The Create a Report page will show the individuals you selected to include in your report under step 3.

9 Select the file format for your report from the drop-down list in step 4.

10 The default options are Microsoft Word, Adobe PDF, and HTML. Some reports can be made available in Microsoft Excel. This would need to be specifically stated in the Report Setup or Report Revision(s) work request.

11 Select the paper size from the drop-down list in step 5.

12 Activity Insight supports US Letter and A4 sizes.

13 Review your selections and select **Build Report**.

14 Activity Insight will build your report and you will be prompted to either open it or save it locally.

> **Warning:** Changing the data in a report does not change the data inside Activity Insight. Use **Manage Your Activities** or Ma**nage Data** to make these changes.

Chapter 9: Managing Work Requests

Overview of Work Requests

At any time, you can make changes to the data collected in Activity Insight by submitting a work request. A work request is the formal method for initiating work to be completed on your behalf by Digital Measures. Work requests should be used to:

- Submit data import files
- Request screen revisions
- Submit sample reports to create new custom reports
- Revise existing reports
- Create and manage user accounts in bulk
- Modify security roles
- Set up additional features

The **Work Requests** utility enables you to submit new work requests and to track the requests you submitted.

What Should Be In a Work Request?

When you submit a work request, you want it completed as quickly as possible with as few questions from Digital Measures as possible. The best way to ensure this is to make certain that your work request is as complete as possible. The following questions should be answered clearly in every work request, when applicable.

- **Who should have access to this field, screen or report?**
  For fields and screens, this is typically administrative users, faculty, or both. For reports, this is typically one or more security roles. Additionally, fields, screens, and reports may be restricted to a specific college or department.

- **What type of screen element or data entry field should be added?**
  If you are specifying a new data entry field to collect a new piece of information, you need to specify what type of field should be used. For more information on the types of data entry fields available, see “Field Types” in Chapter 6: Customizing Screens and Fields.

- **Where should the new screen or screen element be located?**
  Give as much context as possible to describe the location of the new element. For example, if you want to move a text box on the Personal and Contact Information screen, you might include that the new text box should go below the Building Where Your Office is Located field and above the Office Room Number field. If the description is going to be confusing, provide a screenshot as an example.

- **How will the data be used?**
  State whether the data to be collected are to be displayed on a report and, if so, how and where. If you are building a report, state the date range for which you will typically run the report.

- **What should the report look like?**
  Provide instructions as to what data should be included in the report, what criteria should be used, and how the report should be formatted.
- **What information will Digital Measures need to set up additional features?**
  For more information about each of the additional features and the information needed to set each feature up, see Chapter 10: Additional Features.

By clearly answering these questions in your work request and giving as much detail as possible, you increase the likelihood that Digital Measures can complete your request quickly and correctly.

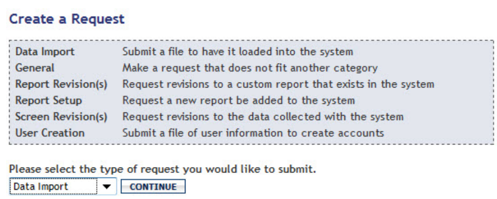
Submitting a Data Import Work Request

Data Import work requests are used to load data into user accounts, including personal information and activity data. This requires creating a properly formatted CSV file and submitting it to Digital Measures through the **Work Requests** utility. Only one data import file can be submitted per work request. See "Working With Comma-Delimited Files" in *Chapter 9: Managing Work Requests* for more information.

> **Note:** A Data Import file should contain a minimum of ten records (rows) of data. Fewer records can be added manually to Activity Insight, or saved and combined with additional records at a later date for a compiled import.

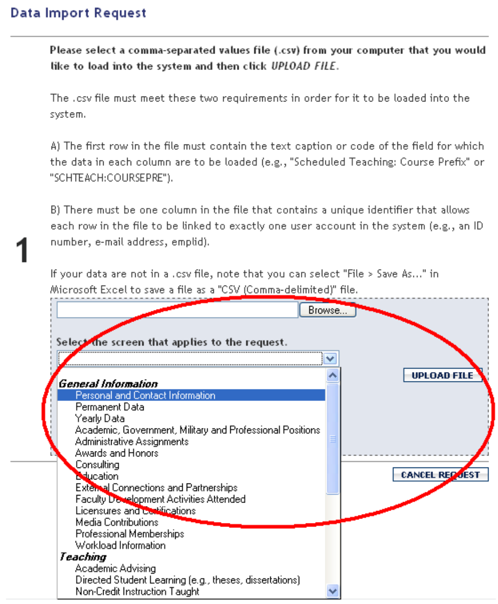
To submit a Data Import Work Request:

1. In Activity Insight, select **Work Requests** in the Left-Hand Menu.
2. Select **Data Import** from the drop-down list and select **Continue**.



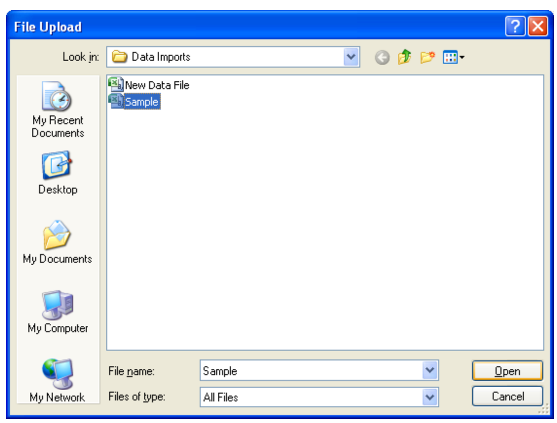
Work Requests *screen showing selecting data import.*

3. In the **Data Import Request** page, select **Browse** and choose the file you want to import.
4. Select the screen to which your data import applies.



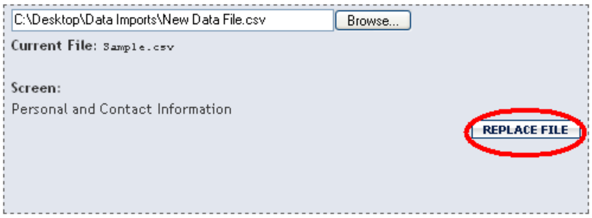
*File upload box in the **Data Import** page.*

5 In the **File Upload** dialog, choose the CSV file that contains your new data and select **Open**.



Windows file upload dialog.

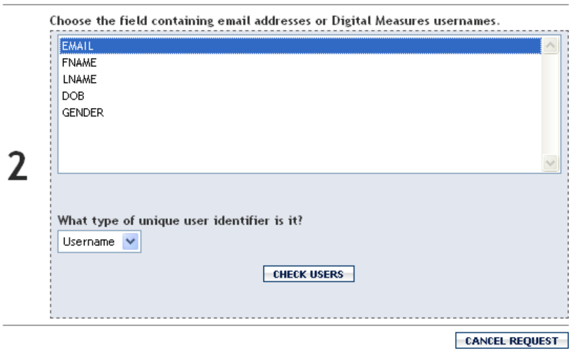
6 If you have chosen the wrong file, select **Browse** in step 1, choose the new file on your local system, select **Open**, then select **Replace File**.



The data import screen showing the replace file button.

7 The columns of the new file are now shown in step 2.

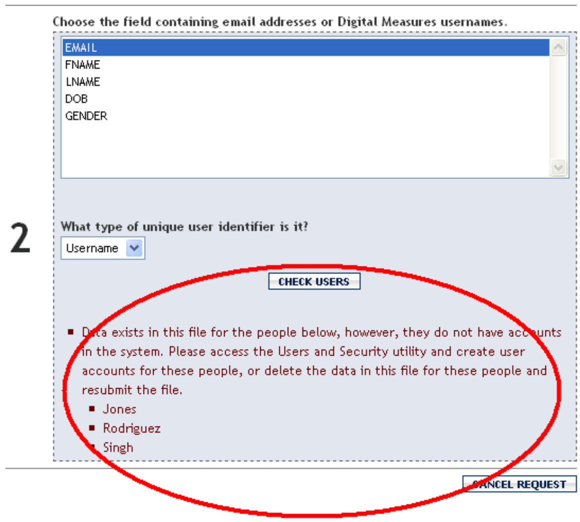
8 When step 2 appears, select the column name that contains the file's unique user IDs and select **Check Users**.



9 Activity Insight compares the contents of the column you selected to the existing user account information in Activity Insight.

10 Each person in the file on whose behalf data will be imported must have an Activity Insight user account, activity must be able to be tracked for the user, and the unique user IDs in the file must be associated with that person in the Activity Insight instrument.

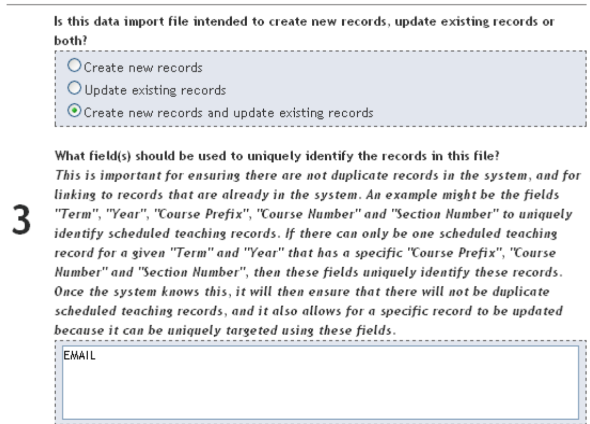
11 If any of the user IDs fail to match with an Activity Insight account for your campus, or the user is not setup to have activity tracked, Activity Insight will display an error message and stop the file import process.



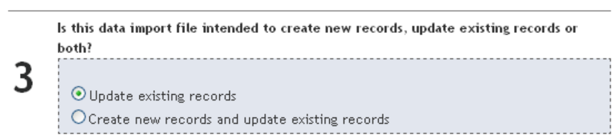
12 To continue, select **Cancel Request** and then either create a user account for this user using the instructions noted on page 76, or delete the row from your CSV file and import the revised file.

13 When Step 3 appears, select one of the following: **Create new records, Update existing records,** or **Create new records and update existing records**.

14 If you choose **Update existing records** or **Create new records and update existing records,** you will need to define the primary keys.



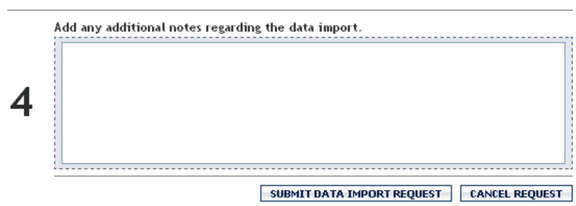
15 If a screen with a defined primary key was selected, you will not have the “Create new records option” or the ability to define a primary key.



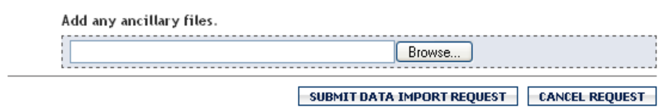
> **Note:** As part of processing a Data Import work request, it is not possible to use the primary key fields on a screen to analyze the records in a CSV file and import only those that do not already exist. Your CSV files must contain only the data for records that should be created or updated, since all data that you provide will be imported.

16 When step 4 appears, enter any additional notes and select **Submit Data Import Request**.

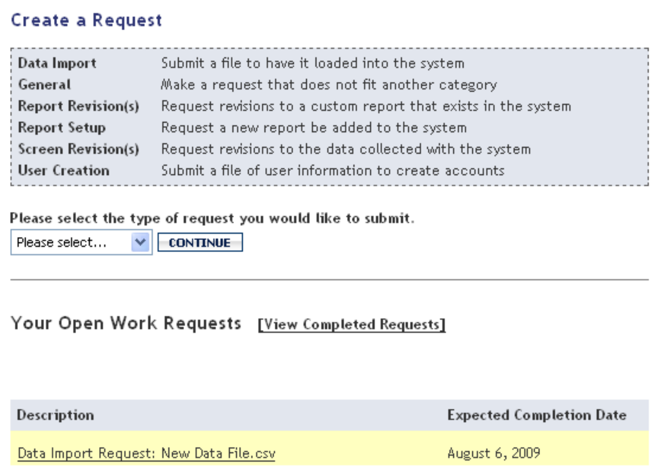
Warning: If there are leading zeroes in your data, they will be stripped when you open and re-save a CSV file in Microsoft Excel. If the data in your CSV file includes leading zeroes, see “Leading Zeroes in CSV Files” in *Chapter 9: Managing Work Requests* for tips and instructions on how to work with this data successfully. It is also a good idea to include instructions in Step 4 that list the columns in your CSV file that have a fixed number of digits and the number of digits each value should have.



17 If a screen with a DSA was selected, you can add ancillary files. An ancillary file is a file that is supplementary to a main data import file.



18 A new Data Import work request is created and added to the **Your Open Work Requests** list.



*The **Work Requests** screen showing the new open work request*.

Once submitted, your Data Import work request is added to the Digital Measures work queue. Digital Measures will notify you when the data file has been imported into Activity Insight.

Working With Comma-Delimited Files

Digital Measures requires that all bulk load files be saved in comma-delimited (CSV) format and meet several requirements. Although it may seem confusing to work with a CSV file rather than a Microsoft Excel spreadsheet, it is not too different. The following hints will help you produce an actionable CSV file for data importing.

First Column: Unique User Identifier

The first column of your CSV file must contain a unique user identifier in Activity Insight for the user account associated with the data in each row. This unique identifier could be:

- An Activity Insight username
- A campus ID number
- An employee ID number
- An email address
- A campus username, if used as Activity Insight username

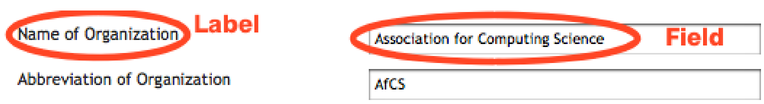
Whatever unique user identifier you use, each one must be linked to exactly one user account in Activity Insight. Do not use unique identifiers that are not stored in Activity Insight under **Users and Security**.

> **Note:** If you have not yet added the unique user identifier that will be used when importing data, this will need to be added before your Data Import work requests using this identifier can be processed. For more information about adding user identifiers, see “Additional Unique User Identifiers” in *Chapter 5: Managing User Accounts*.

First Row: Labels of the Input Field

Each column must contain a different piece of information, corresponding to a single input field in Activity Insight. The first cell in the column, in the “header row” of the sheet, must correspond to the label of its corresponding input field.

In the two figures below, the labels “Name of Organization” and “Abbreviation of Organization” for two input boxes in the Professional Membership screen are included in the first row of columns B and C.



The labels for two data fields in the Professional Membership screen.

	A	B	C	D	E	F	G	H
1	Username	Name of Org	Abbreviation	Leadership P	Scope of Org	Description o	Start Date	End Date
2	tlzwingli	Association f	AfCS	Vice Presiden	International	Leading orga	22-Jun-06	30-Jun-07
3	tlzwingli	IEEE	IEEE	Member	International	World's large	2/1/69	

Microsoft Excel spreadsheet showing labels of input fields as first row.

> **Note:** Copy the column of field labels or codes from your Configuration Report and `Paste Special>Transpose` in Microsoft Excel to create the column headers of your data import CSV file.

Creating Flat Files

Some screens contain Dynamic Sub-Answers (DSAs), which can cause some confusion when creating CSV files for data import. It is advised that you keep each record on one row, and repeat any fields that need to hold more than one record as multiple columns.

F	G	H	I	J	K	L	M	N	O
FACULTY_NAME1	FNAME1	MNAME1	LNAME1	STUDENT_LEVEL1	FACULTY_NAME2	FNAME2	MNAME2	LNAME2	STUDENT_LEVEL2
richards					sjacobs				

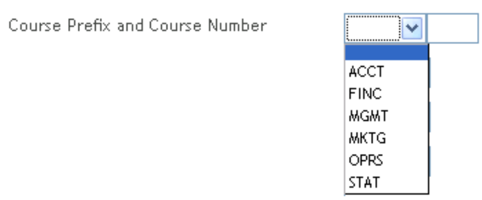
Section of a Microsoft Excel spreadsheet showing how to accommodate multiple authors.

In the example above, taken from the Intellectual Contributions screen, the author fields included in the DSA are repeated in order to provide columns that can include all authors on a single row.

> **Note:** You can repeat the fields contained in a DSA as many times in your data import file as needed; however, each of the headers in your data import file must be unique in that file. To differentiate between sets of DSA fields simply append numbers to the headers within each set.

Match Drop-Down Lists Exactly

If you are going to add data for an input field that is a drop-down list in Activity Insight, you must use the contents of the list exactly in your data. For example, if Activity Insight uses four-letter departmental abbreviations for course prefixes, you cannot use full department names in your CSV file, nor can you use a three-letter abbreviation, without providing data mapping instructions in your work request. Otherwise, you must use the exact wording and casing as is in the drop-down list. If you need to provide data mapping instructions or if additions/revisions to a drop-down list will be required in order for a Data Import work request to be completed, include specific instructions on step 4 of the Data Import work request screen.



Course Prefix drop-down list, showing abbreviations.

	A	B	C	D	E	F	G
1	ID	Term	Year	Course Name	Course Prefix	Course Number	Section Number
2	sjacobs	Fall	2007	Intro to Accounting	ACCT	101	907
3	richards	Fall	2007	Intro to Finance	FINC	101	902
4	richards	Fall	2007	Intro to Management	MGMT	101	905
5	roberts	Fall	2007	Intro to Marketing	MKTG	101	910
6	jsommers	Fall	2007	Intro to Operations Management	OPRS	101	922
7	jthomas	Fall	2007	Intro to Statistics	STAT	101	904

Microsoft Excel spreadsheet showing exact correspondence to the drop-down list's contents.

> **Note:** You can download a spreadsheet containing the current configuration of your instance of Activity Insight, including the contents of the drop-down lists, from the **Dashboard** page. See “Configuration Report” in *Chapter 6: Customizing Screens and Fields.*

Working With Data in CSV Files

If you need to edit the content of a CSV file before submitting it – to modify column headers, delete unnecessary columns or data, etc. – watch closely how the CSV editor you have chosen to work with interprets the data in your file. In particular, watch for places where your raw data contains:

- Leading zeroes
- Page ranges
- Field values that contain commas

If you have chosen Microsoft Excel for working with CSV files, watch out for the auto-formatting function in the program, as this function impacts how data with leading zeroes and ranges of page numbers are viewed and will be saved in the edited CSV file.

Leading Zeroes in CSV Files

Depending on how you open and work with a file in Microsoft Excel, data with leading zeroes may be altered as part of opening and re-saving your CSV file. Microsoft Excel seeks to apply formatting to files opened in the program. Because CSV files do not contain formatting, upon opening a CSV file in Excel the program will use its own formatting rules to auto-format the content of your file. If you have, for example, course numbers that always consist of six digits, some of which have leading zeroes, Excel will interpret this column as containing numbers and will strip the leading zeroes from those values. A value of “000101” will be auto-formatted as “101”. When you save the file, the leading zeroes will remain stripped out, leaving this value as “101”.

One way to prevent this automated formatting is to import your CSV file’s data into Microsoft Excel, rather than opening the file directly with Excel. Importing gives you the option to select the data format for each column, and if you select "Text", this will preserve your leading zeroes while you work with the file, as well as when you save the edited file.

To import a CSV file in Microsoft Excel 2007 or 2010:

1. Open Microsoft Excel.
2. Navigate to the **Data** tab, and select **From Text** in the **Get External Data** portion of the ribbon.
3. Locate your CSV file and click **Import**.
4. In the **Text Import Wizard**, verify that **Delimited** has been selected and that other parameters in the wizard are correct. Click **Next**.

5 Select **Comma** in the list of **Delimiters** and click **Next**.

6 Choose **Text** as the column data format for the relevant columns in your file and click **Finish**.

7 Choose where you want your imported CSV data to appear in your workbook and click **OK**.

An additional step that you should take when submitting your CSV file through a Data Import work request is to note in Step 4 the columns in your CSV file that have a fixed number of digits and the number of digits each value should have. This will enable Digital Measures to confirm that those columns contain the digits needed to correctly import your data before the file is processed.

If the edits you need to make to your CSV file are minor, consider making them within a plain text editor such as Notepad.

Page Ranges in CSV Files

Opening a CSV file in Excel may also result in certain data being formatted as dates. For example, Excel will automatically convert a page range of "1-10" into "10-Jan". This conversion also affects the underlying data: converting "10-Jan" back to text results in a number such as "40553", which is how Excel stores this date. To convert this back to "1-10", you must change the column format to 'Text' and re-enter "1-10" manually.

Alternatively, you can use the process noted above to import the CSV file into Excel and apply “Text” formatting to the appropriate columns.

Handling Commas That Are a Part of a Field Value

When commas are contained within the data, but the value in which they appear is not enclosed in quotes, these commas are seen as field delimiters. If your data contain commas you will need to use quotes to enclose the field's contents to prevent the comma in the middle of your value from being treated as a delimiter. If values containing commas are not enclosed by quotes the file will not be parsed correctly, resulting in data that are not correctly tied to the appropriate column header and will not be loaded into the correct question on the screen if the import is completed.

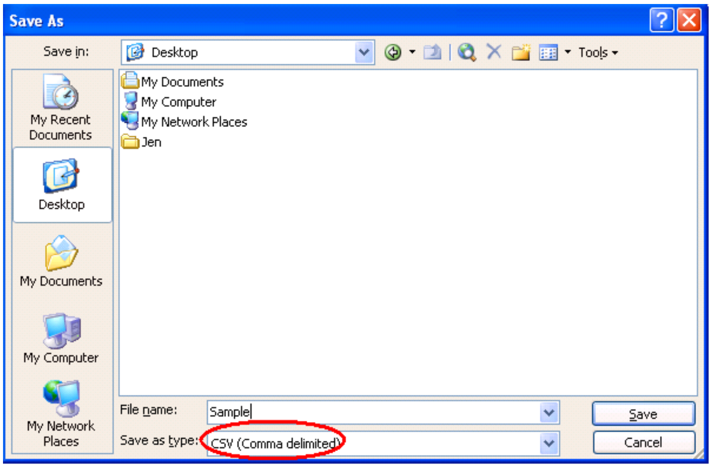
Saving a Microsoft Excel Spreadsheet as a Comma-Delimited (CSV) File

You can use Microsoft Excel to develop your data file and then save it in the format required by Digital Measures, the comma-delimited (CSV) file.

> **Warning:** You cannot export more than one worksheet into a single CSV file. You must save each worksheet as a separate CSV file and each one must contain a column for the unique user identifier.

To save a Microsoft Excel spreadsheet as a CSV, comma-delimited file:

1. In Excel, open the file, select **File**, then **Save As**.
2. In the Save As dialog, select **CSV (Comma delimited)** from the **Save as type** list.



Excel's Save As dialog, with the Save as type set to CSV (Comma-delimited).

3. Choose a location to save the file, change the filename if desired, and select **Save**.
4. If your workbook contains more than one worksheet, Excel will prompt you to confirm that it is saving the active worksheet only.
5. If your worksheet contains anything more than raw values, Excel will warn you that some of the file's features are not compatible with the CSV format. Select **Yes** to continue saving the file.

Submitting Report Setup Work Requests

Submit a separate Report Setup work request to Digital Measures for each report. The reports you submit should be in Microsoft Word or Excel, or Rich Text Format. Each report should be accompanied by additional information.

To add a new custom report:

1 In Activity Insight, select **Work Requests** in the Left-Hand Menu.

2 Select **Report Setup** in the drop-down list and select **Continue**.

3 In step 1, describe the report template that you want created.

4 Make sure that you include:

a) *Who will run this report?* This is typically one or more security roles for one or more units, such as the College Limited Administrator security role for the College of Education, or Faculty security role for the entire campus. A list of available security roles can be viewed by selecting the **View Security Roles** link on the **Users and Security** screen.

> **Note:** Reports cannot be assigned at an individual level; access is granted based on the security role(s) a user is assigned to.

b) *What should the report be named?* Indicate the name by which you would like the report to appear on your **Run Custom Reports** drop-down list. Capitalization and punctuation are important. For example, Faculty Activity Report, Annual Activity Report, or Faculty Annual Activity Report.

5 See "What Should Be in a Work Request" in *Chapter 9: Managing Work Requests* for more information.

6 In Step 2, select **Browse** and choose the sample report you would like built.

7 If a sample report does not exist, you will need to create a mock-up report. See "Creating a Sample Mock-Up Report" in *Chapter 7: Customizing Reports* for more information.

8 Select **Submit Request**.

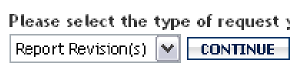
9 Digital Measures will process the work request and create a new report template based on your mock-up. Digital Measures will notify you when your report has been added.

Submitting Report Revision(s) Work Requests

Submit a separate Report Revision(s) work request to Digital Measures for each report you need revised. The reports you submit should be in Microsoft Word or Excel, or Rich Text Format. Each report should be accompanied by additional information.

To modify an existing custom report:

1. In Activity Insight, select **Work Requests** in the Left-Hand Menu.
2. Select **Report Revision(s)** in the drop-down list and select **Continue**.



3. In step 1, describe the report modifications that you want made.
4. Make sure that you include:

   a) *Any changes to who will run this report.* This is typically one or more security roles for one or more units, such as the College Limited Administrator security role for the College of Education, or Faculty security role for the entire campus.

   > **Note:** Reports cannot be assigned at an individual level; access is granted based on the security role(s) a user is assigned to.

   b) *Any changes to what the report should be named?* Indicate the name by which you would like the report to appear on your **Run Custom Reports** drop-down list. Capitalization and punctuation are important. Examples include Faculty Activity Report, Annual Activity Report, or Faculty Annual Activity Report.

5. See “What Should Be in a Work Request” in *Chapter 9: Managing Work Requests* for more information.
6. In Step 2, select **Browse**, choose the mock-up report that reflects the modifications you would like made. See “Creating a Sample Mock-Up Report” in *Chapter 7: Customizing Reports* for more information.

> **Note:** A helpful tool for creating report mock-ups is the **Details of how this report is built…** link. This link becomes visible for most reports when selecting a custom report under **Run Custom Reports.** Download and edit this document to display the changes you are requesting.

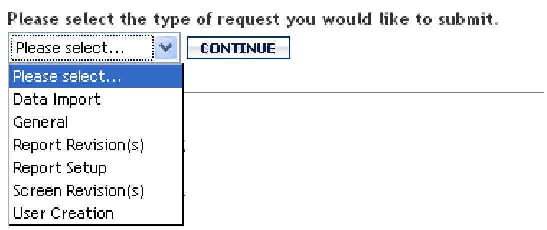
7 Select **Submit Request**.

8 Digital Measures will process the work request and modify the report template based on your mock-up. Digital Measures will notify you when the revisions to your report are complete.

Submitting All Other Types of Work Requests

To submit a new work request:

1. In Activity Insight, select **Work Requests** in the Left-Hand Menu.
2. In the drop-down list, select the type of request you are submitting.
   a) To request changes or additions to one of your Activity Insight screens or data fields in the instrument, select **Screen Revision(s)**.
   b) To submit a file containing user data to create new user accounts, select **User Creation**.
   c) For all other requests, select **General**.



Selecting the type of work request being submitted.

3. Select **Continue**.
4. Complete the description of your request in the textbox.
5. If applicable, select **Browse** to find the file you wish to include with your request.
6. After you have selected the file, select **Upload File** to import the file to the server.
7. Select **Submit Request**.
8. Digital Measures will process the work request and will notify you when it has been completed.

Tracking and Responding to Work Requests

Tracking Work Requests

You can view completed and currently open work requests that you have submitted.

> **Note:** University Administrators can view work requests submitted by the campus's College Administrators, but cannot respond to them, as a user can only respond to work requests that he or she submitted.

- **To view open work requests that you have submitted:**

  In Activity Insight, select **Work Requests** in the Left-Hand Menu. The open work requests are listed at the bottom of the page.

- **To view completed work requests that you have submitted:**

  1. In Activity Insight, select **Work Requests** in the Left-Hand Menu.
  2. Above the list of open work requests, select **View Completed Requests**.

Responding to Work Requests

If Digital Measures needs additional information or guidance in order to complete a work request, the work request will be used to communicate questions. To respond, login to Activity Insight and navigate to the open work request.

> **Note:** When Digital Measures sends a message to you through the **Work Requests** utility, a notification email will also be sent to you to alert you to the fact that the work request is awaiting your response. This email will include a copy of the text from the message in the work request, as well as the original request note that provides context for the response.
>
> This email is intended to be a notification only; please *do not* respond to this email.

Chapter 10: Additional Features

Advanced Authentication

The login, or authentication, process is important in that it plays a vital role in ensuring your Activity Insight data are secure. It is beneficial, however, to make it as easy as possible for your users to access Activity Insight. The more seamless authentication is for your users, the less likely they are to forget passwords or write them on notes in their offices, compromising security. **Advanced Authentication** enables your users to use the same username and password they use for other purposes, such as signing in to a portal or accessing their email.

By default, Activity Insight users are authenticated using *Local Authentication*. Each user is assigned a username and password specific to Activity Insight, making it the least convenient authentication method for users because they have to remember another password.

Activity Insight also supports three methods of **Advanced Authentication**.

- **Shibboleth Authentication,** the most secure method and the one most convenient for users – this is the method Digital Measures recommends.
- **Portal Authentication,** where users access Activity Insight through a link in your campus portal.
- **LDAP Authentication,** where users log into Activity Insight using their campus user credentials.

Warning: Users' Activity Insight usernames must match their campus usernames when using **Advanced Authentication**.

Only one method of **Advanced Authentication** can be in place per campus at one time. However, Local Authentication is always available. It is recommended that the Activity Insight University Administrator use Local Authentication so he or she can always access Activity Insight, even if your Shibboleth Identity Provider (IdP), portal, or LDAP servers are down.

Note: You can change the authentication method for Activity Insight for any user account at any time, except for users in the University Administrator or College Administrator security roles. This is to prevent these users from locking themselves out of Activity Insight. To change the authentication method for users in the University Administrator or College Administrator security roles, submit a General work request.

Local Authentication

This is the default authentication method. The username, unless you specify otherwise, is the text prior to the @ symbol in the users' email addresses. With Local Authentication, users must use a username and password combination set unique within Activity Insight.

This is the least preferred method for users. It is less secure because it forces them to remember another password. It is also much less convenient than Shibboleth, Portal, or LDAP Authentication.

Requirements

Local Authentication in Activity Insight requires that users use the Activity Insight login page.

Implementation Details

Because Local Authentication is the default for Activity Insight, no other actions are necessary from you other than creating user accounts. Digital Measures will create the initial passwords for the accounts. These passwords can be accessed either by directing users to use the **Request Password** link on the Login page, or you can request the password for the user by selecting the pencil (edit) icon in **Users and Security**, and selecting **Request Password**. Upon signing into Activity Insight with this default password, users will be prompted to change their password.

Shibboleth Authentication

Your campus may already support Shibboleth Authentication, which provides centralized authentication to the various online applications that your users access. Digital Measures supports Shibboleth Authentication, allowing your users to access Digital Measures either directly or via a link, such as "Access Digital Measures" or "Faculty Activity Reporting System." After clicking this link, users who do not already have a valid login session will be prompted by your campus' Shibboleth Identity Provider (IdP) for their credentials, and then will be automatically logged in to Digital Measures behind-the-scenes.

The Digital Measures login URL accepts the valid login session, then decrypts and verifies that the specified user has a Digital Measures user account.

Digital Measures is a sponsored partner of the InCommon Federation. If your campus is also a member of the InCommon Federation, implementation is straightforward.

> **Important:** Digital Measures requires that your campus is a member of a federation in order to proceed with the implementation of Shibboleth Authentication.

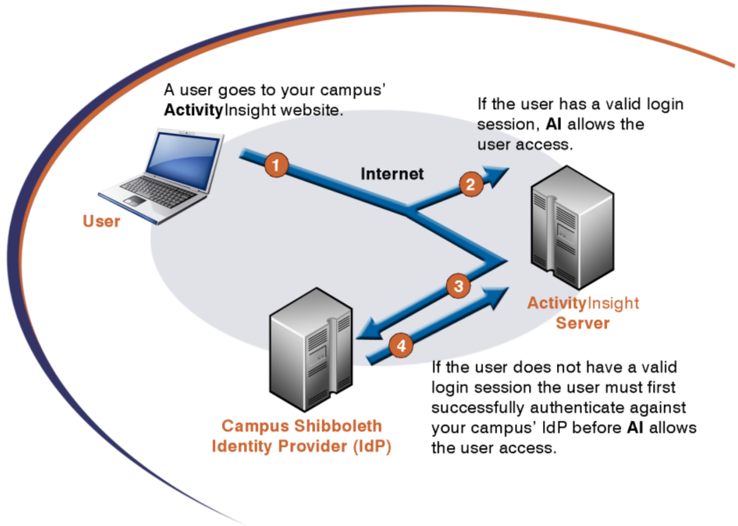


Figure 2 – Using Shibboleth Authentication.

Shibboleth Authentication is the most secure and convenient authentication method. Your users never have to provide their credentials to a Digital Measures server - only to your campus's IdP. Plus, you can use any authentication method you wish at your campus.

Some of the individuals whose activities will be tracked in Activity Insight may not have accounts in your campus IdP. Also, you may wish to leave some administrator accounts to use Activity Insight's default Local Authentication so they may still access Activity Insight**,** even if the IdP fails. You will need to provide a list of those user accounts that should continue to use the default, Local Authentication.

> **Important:** At present, Digital Measures supports Shibboleth only for authentication, not authorization.
>
> By default, Digital Measures will use the `eduPersonPrincipalName` attribute as the username, removing any text following an "@" sign. If your campus wishes to use an attribute other than `eduPersonPrincipalName`, please submit the attribute name as a General work request. The entire attribute value must match the user's Digital Measures username and must follow Digital Measures username requirements outlined on page 73. All other attributes will be ignored.

Requirements

Shibboleth Authentication requires the involvement of your campus's technical staff resources, but provides the most secure and convenient solution. To implement it, your campus will need to configure your Shibboleth Identity Provider (IdP) to work with Digital Measures Shibboleth Service Provider (SP).

Digital Measures Shibboleth SP EntityID is https://www.digitalmeasures.com/shibboleth-sp/. This URL also provides a self-published copy of Digital Measures Shibboleth SP metadata for reference or testing. However, this metadata file should not be used in production environments; instead, please rely on Digital Measures metadata published by the federation you participate in.

Your Identity Provider should be configured to release attributes to any server listed in Digital Measures Service Provider metadata to allow use from both the *production* and *beta* testing environments.

Federation Membership

Digital Measures requires federation membership for several reasons:

- Federations provide rules or guidelines for supported configurations and recommended attributes. These requirements help ensure Digital Measures ability to consistently support clients during initial setup, troubleshooting, and future changes.

- Federations allow interoperability between all member organizations, with reduced involvement by Information Technology staff for both Identity Providers and Service Providers.

- Federations require disclosure of privacy, access control, and security breach notification policies by member organizations, helping to ensuring the security and confidentiality of all private data.

Digital Measures strongly recommends membership in the InCommon Federation, the most widely used and trusted federation within higher education in the United States. Other regional and national federations also exist; please review the following resources to identify a federation appropriate for your campus:

- http://www.protectnetwork.org/support/faq/identity-federations
- https://refeds.terena.org/index.php/Federations

> **Note:** Digital Measures must also join the federation you choose to participate in, which may affect the time required to enable Shibboleth authentication for your campus. Additionally, many higher education federations require that commercial Service Providers be sponsored by one or more higher education members; please determine if your organization could act as a sponsor for Digital Measures application process. As part of evaluating membership in additional federations, Digital Measures will need to consider the impact of any fees assessed for joining. To request that Digital Measures consider joining a federation, please provide the federation's web site URL in a General work request.

Test Account

Digital Measures requires a test account to test connectivity during the initial set up of Shibboleth Authentication and on an ongoing basis as changes or enhancements are made to Digital Measures Shibboleth environment. For this reason it is necessary for this test account to remain active.

> **Warning:** Without a test account, Digital Measures will be unable to test Shibboleth changes for you. This will prevent Digital Measures from ensuring that future Shibboleth enhancements and upgrades will have no adverse impact on your configuration.

In the absence of a test account, it will be necessary for you to perform any required testing. Since changes may need to be made quickly, Digital Measures cannot guarantee a certain amount of advance notice when making a request that you test. Of course, as much advance notice as is possible will be provided. If you prefer testing on your end over providing a test account, please provide the contact information for the individual Digital_Measures should contact with Shibboleth questions. If questions are presented to this individual, all contact will occur via email. As the Activity Insight Administrator, you will be copied on such messages.

Implementation Details

Once your technical staff has completed the required steps, they will need to provide you the following technical details:

- Your institution's Shibboleth EntityID
- The name of the Shibboleth federation in which you participate

- A permanent test username and password; alternatively, the contact information for the person on your campus who will be testing Shibboleth Authentication
- A single sign-off URL, if your campus has one (optional)
- A URL for authentication errors, if users should receive instructions regarding who to contact in the event that access is denied (optional)

> **Important:** Shibboleth does not yet define a standard single sign-off protocol.
>
> If you have a single sign-off URL you would like users redirected to after local logoff, please provide the URL in the General work request.
>
> Also, if your single sign-off implementation supports a query parameter to redirect the user after central logoff, please indicate the query parameter as well.

Once you have received this information, submit a General work request with it and your list of excluded users, if any. Digital Measures will complete the necessary work to configure Shibboleth Authentication in Activity Insight for you. Digital Measures will provide the login URL configured to use your IdP and ask you to confirm the date on which the user accounts will be switched to Shibboleth Authentication.

> **Important:** Users can no longer use the Activity Insight login page after they have been switched to Shibboleth Authentication.

> **Warning:** The password for the test account Digital Measures will use should be submitted in an attachment to the work request, rather than in the work request note itself. When Digital Measures responds to one of your work requests, a notification email is generated and sent to your email address to alert you that the request is awaiting your response. This notification email will include the text from the original work request note. As attachments to work requests are never included in the notification email, including passwords and other sensitive details in an attachment will ensure that these always remain within the secure **Work Requests** utility.

Portal Authentication

Your campus may have a portal that provides centralized access to the various online applications your users require. Digital Measures supports pass-through authentication that enables you to simply add a link to your portal, such as "Access Digital Measures" or "Faculty Activity Reporting System." After selecting this link, users are automatically logged in to Digital Measures behind-the-scenes.

Users will need to authenticate against one of your campus servers. If the user is logging solely into Digital Measures, you may choose to skip the following step, generate the encrypted authentication token immediately, and redirect the user directly to Digital Measures authentication URL.

If the user is logging into a campus-wide web portal, a link may be presented among the menu of destinations accessible from the portal. This link should point to a script on a campus server that can generate the signed authentication token, and redirect the user to a Digital Measures authentication URL.

The Digital Measures authentication URL accepts the signed token, then decrypts and verifies the following:

- The specified user has a Digital Measures user account
- The authentication token has not expired
- The user's IP address matches the IP address specified in the token (optional)
- The user's HTTP referrer matches a list of known URLs (optional)
- The signature is valid for all supplied values

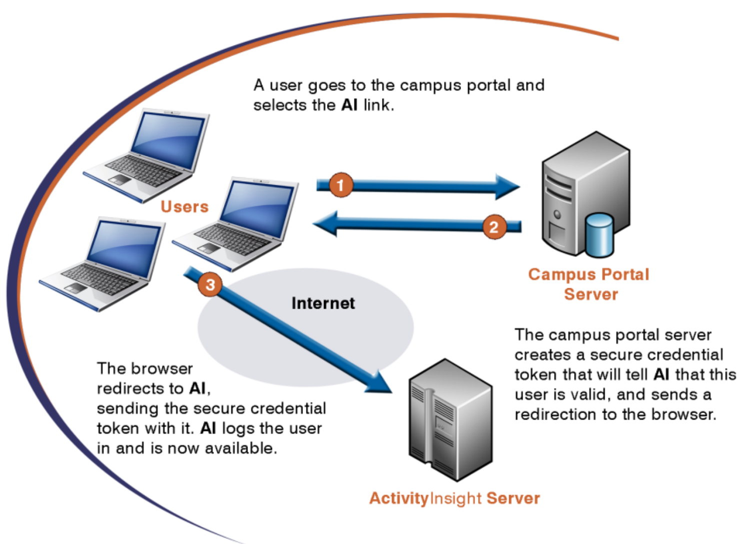


Figure 3 – Using Portal Authentication.

Portal authentication is a secure authentication method. Your users never have to provide their credentials to a Digital Measures server, only to the server managed by your campus. The token is encrypted using HMAC-signed authentication and contains the user's Activity Insight username and an expiration date. The token is only submitted once, during the initial redirection to Activity Insight. Activity Insight can also verify the HTTP referrer on the request to be sure it came from your campus. Plus, you can use any authentication method you wish at your campus.

Some of the individuals whose activities will be tracked in Activity Insight may not have accounts in your campus system. Also, you may wish to leave some administrator accounts to use Activity Insight's default Local Authentication so they may still access Activity Insight**,** even if the portal fails. You will need to provide a list of those user accounts that should continue to use the default, Local Authentication.

Requirements

Portal Authentication requires the most effort from your campus's technical staff of the three **Advanced Authentication** methods supported by Activity Insight, but provides a secure and convenient solution. To implement it, your campus will need to:

- Write a script to create the encrypted token
- Successfully complete the authentication test on the Portal Authentication test page: https://www.digitalmeasures.com/login/dm/faculty/authentication/HMACTest.do
- Place a link on your campus's portal site that will call the token script

Implementation Details

Once your technical staff has completed the required steps, they will need to provide you the following technical details:

- Secure HTTPS-Referrer(s) that Activity Insight should validate for, if any
- URL for users to log into your portal, which will be used to redirect users when they log out of Activity Insight or if their session times out
- A single sign-off URL, if your campus has one (optional)
- A URL for authentication errors, if users should receive instructions regarding who to contact in case access is denied (optional)

> **Note:** Users can no longer use the Activity Insight login page after they have been switched to Portal Authentication.

Once you have received this information, submit a General work request with it and your list of excluded users, if any. Digital Measures will complete the necessary work to configure Portal Authentication for you in Activity Insight. Digital Measures will provide the production URL and encryption key and ask you to confirm the date on which the user accounts will be switched to Portal Authentication.

LDAP Authentication

LDAP Authentication enables Digital Measures to check user credentials against a campus-wide directory. Users will visit a Digital Measures login page for your campus, where they will enter a username and password. These credentials are then passed on to your campus-wide account management system for verification.

To use LDAP Authentication, your campus must have a deployed account management system, such as Microsoft's Active Directory, Oracle's Internet Directory, Novell eDirectory, or one of many other LDAP servers.

Users visit a Digital Measures login page and make an authentication attempt. Digital Measures connects to your directory server and attempts to authenticate against it with the authentication information provided by the user. The user is allowed into Activity Insight if the authentication attempt is successful and a Digital Measures account for the person exists.

LDAP Authentication lets your users use their campus credentials to access Activity Insight. Unlike an integrated portal solution, users must log in using the Activity Insight login page. However, they use their normal campus username and password, which Activity Insight checks using a secure connection to your campus's server.

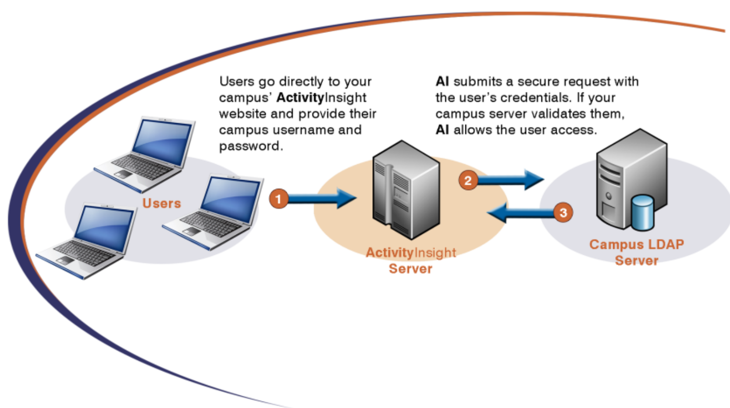


Figure 4 - Using LDAP Authentication.

Although user credentials are sent over a secure connection, they still must pass through Digital Measures servers and a rule allowing this connection must be made in your campus's firewall. A firewall is a part of a computer system or network that is designed to block unauthorized access while permitting authorized communications.

Some of the individuals tracked in Activity Insight may not have accounts in your campus system. Also, you may wish to leave some administrator accounts to use Activity Insight's default, Local Authentication, so that they may still access Activity Insight**,** even if the connection to your campus server fails. You will need to provide a list of those user accounts that should continue to use the default, Local Authentication.

Only one LDAP Authentication server can be in place per institution at one time.

Requirements

LDAP Authentication requires that your campus configure its firewall so it allows requests:

- Over any of the following ports:

    - 636 (LDAP over SSL)
    - 1636 (LDAP over SSL, alternate)
    - 3269 (LDAP over SSL, Microsoft Global Catalog Server)
    - 389 (LDAP with TLS)
    - 1389 (LDAP with TLS, alternate)
    - 3268 (LDAP with TLS, Microsoft Global Catalog Server)

    Note that either SSL or TLS is required; Digital Measures does not support unencrypted LDAP Authentication.

- From both of the following Digital Measures IP addresses:

    - 75.102.5.252
    - 75.102.40.10

Your campus will also need to create an account on that server for Digital Measures to access the campus server.

Implementation Details

Once your technical staff has completed the required steps, they will need to provide you the following technical details for the campus server:

- Domain name or IP address of the LDAP server
- LDAP server's port
- LDAP server's X.509 certificate chain, encoded as ASN.1 DER, if using options 3 or 4 below

    Digital Measures supports the following certificate authorities, in order of preference:

    1. Any certificate authority trusted by the Mozilla project
    2. ipsCA, which currently offers free certificates to educational institutions
    3. A campus certificate authority
    4. A self-signed certificate

> **Note:** Options 3 and 4, above, require you, as the Digital Measures Administrator, to perform ongoing work. Digital Measures must be provided with the full chain of X.509 certificates in ASN.1 DER format to connect to your LDAP server, and must be notified each time any of the certificates in the chain are renewed or replaced.

- Account credentials for Digital Measures to access the campus server.
- DN and password for a permanent test account.
- Preferred DN conversion method and details:
  - If Pattern:
    1. String used to construct DN
  - If Anonymous Search:
    1. String used to construct search criteria
    2. One or more parent DNs to search under
  - If Authenticated Search:
    1. DN and Password to bind with when searching
    2. String used to construct search criteria
    3. One or more parent DNs to search under

Once you have received this information, submit a General work request with it and your list of excluded users. Digital Measures will complete the necessary work to configure LDAP Authentication for you in Activity Insight. Digital Measures will contact you when the change has been made and will ask you to confirm the date on which the user accounts will be switched to LDAP Authentication.

> **Note:** Once LDAP Authentication is in place, users will continue to use the same Digital Measures login page to authenticate, but they may use a different username to do so than they did previously. Take a moment to review the login page and evaluate whether any modifications should be made to more clearly convey the username users should use to authenticate. See "Logging In to ActivityInsight" in *Chapter 2: Navigating ActivityInsight* for more information.

Warning: The password for the account Digital Measures will use to access your server should be submitted in an attachment to the work request, rather than in the work request note itself. When Digital Measures responds to one of your work requests, a notification email is generated and sent to your email address to alert you that the request is awaiting your response. This notification email will include the text from the original work request note. As attachments to work requests are never included in the notification email, including passwords and other sensitive details in an attachment will ensure that these always remain within the secure **Work Requests** utility.

Beta Environment

A beta environment is available for testing. The beta environment can be accessed by replacing `www` with `beta` at the beginning of the URL your campus uses to log in to Activity Insight. An example of this URL is https://beta.digitalmeasures.com/login/YourUniversity/faculty/.

Please note the following points regarding the beta environment:

- The beta environment is for testing only. Data are not permanently saved or backed up.
- The beta environment is refreshed from production every weekend. Any changes made in the beta environment will be overwritten by the production data.
- Email is not sent from the beta environment.
- Work requests submitted in the beta environment are not monitored and any attached files may not be accessible.

> **Note:** User accounts must be set to Local or LDAP Authentication in the beta environment in order to access it.

Data Backups

Digital Measures takes significant steps to ensure your campus's Activity Insight data are safely stored. Five backups of all client data are made each night. This is part of Digital Measures disaster recovery strategy, as outlined in more detail in "Database Type, Servers and Security" in *Chapter 1: Introduction*. However, many clients desire to maintain local backups of their data, which is encouraged. Local backups absolutely guarantee that you have a full copy of all your data as of a specific point in time that is controlled by you, ready for whatever purposes you may have. It also enables you to store your data in a data warehouse or use the data in other software applications, if you desire.

To activate **Data Backups** for your campus's Activity Insight data, submit a General work request to Digital Measures. Digital Measures will then provide you with the URL, username and password you will need to access your data backups. Data backups are run every weekend, and the data can be accessed as-is until it is overwritten by the next week's backup record.

Mirrored Files

Your users keep track of their activities with Activity Insight. In addition to recording information about these activities, your users can attach files, such as:

- Full-texts of intellectual contributions your faculty have published
- Syllabi of courses your faculty have taught
- Presentation files, such as PowerPoint documents, of presentations your faculty have given

Authorized users on your campus will be able to access these files at any time, which enables your campus to report activity data and supporting documentation together to provide a more complete picture of the activities in which your faculty members are involved.

Mirrored Files adds to this by enabling you to make files publicly accessible. If you choose to configure your secondary location to permit public access, you can:

- Configure links in custom reports to point to the secondary location instead of Activity Insight. To request this, once **Mirrored Files** is in place, simply submit a Report Revision(s) work request noting which file upload field links in the custom report should point to the secondary location.

- Include links to stored files in a faculty directory populated using **Web Services**.

Furthermore, **Mirrored Files** can provide you with a location from which you can make a local backup of your files.

Setting Up Mirrored Files

Mirrored Files involves creating a secondary file storage location to which files are replicated from Activity Insight immediately after they are stored. You can create a secondary location either on a server on your campus or with Amazon.

Storing the files on your campus may take a little more work to put in place and maintain; however, your campus may prefer the files reside on your campus. Working with Amazon is a breeze to put in place and maintain, and it is quite inexpensive, but the files are not stored on your campus. Both approaches enable the same features within this system, so the approach you use is strictly based on whether you prefer to keep the files on your campus or with Amazon.

Mirrored Files has been designed to work in concert with the file storage functionality automatically available in Activity Insight. Once you have put **Mirrored Files** in place, any updates to the files your users store will first be made in Activity Insight and then the updates will be replicated to your campus server or Amazon. For example, if a user stores a new file, the file will be stored in Activity Insight and then will be immediately sent to your secondary location. Similarly, if a file is replaced or deleted, this will take place first in Activity Insight and then immediately thereafter in the secondary location.

Any file size or type restrictions you chose to implement for your data collection instrument will apply here as well.

Digital Measures monitors **Mirrored Files** setups to ensure they are fully functional. If for some reason the connection from Activity Insight the secondary location fails, file storage, replacement and deletion will not work. This ensures that the Digital Measures location and your secondary location mirror one another at all times. Users will be unable to store files until that connection has been restored.

File retrieval from your campus's Digital Measures storage location will be possible at all times. The ability to retrieve files from your secondary location will depend entirely on the settings you configure for that location.

Storing Files With Amazon Simple Storage Service

Requirements

Mirrored Files using Amazon S3 requires that your institution purchase storage space from Amazon. To purchase storage space from Amazon, visit http://aws.amazon.com/s3.

Additional permissions may be needed for your desired uses if Amazon S3 for **Mirrored Files**. For example, backup software may require specific permissions to access your files; publicly available files may require anonymous read-only access. Your technical team will need to take steps to implement the appropriate permissions.

> **Important:** Digital Measures does not provide, is not responsible for, and makes no assurances regarding the products or services offered by Amazon. Digital Measures privacy policies do not apply to Amazon. You should review Amazon's privacy policy and terms of use to ensure compliance with your institution's policies.

Implementation Details

When you are ready to implement **Mirrored Files**, submit a General work request to Digital Measures with the following details:

- Amazon S3 Access Key ID
- Amazon S3 Secret Access Key
- If you are setting up **Mirrored Files** for multiple data collection instruments, be sure to note for which instruments the Amazon S3 account should be used.

To obtain your Amazon S3 Access Key ID and Secret Access Key:

1. Login to Amazon Web Services.
2. Select **Security Credentials**.

3 Under the heading **Access Credentials**, in the section **Access Keys**, you will have at least one **Access Key ID**.

4 If you wish to generate a new Access Key ID, select **Create a New access key**.

5 For the Access Key ID that you will use with Activity Insight, in the same section, under the heading **Secret Access Key**, select **Show**.

> **Warning:** The Amazon S3 access credentials that Digital Measures will use to access your storage space should be submitted in an attachment to the work request, rather than in the work request note itself. When Digital Measures responds to one of your work requests, a notification email is generated and sent to your email address to alert you that the request is awaiting your response. This notification email will include the text from the original work request note. As attachments to work requests are never included in the notification email, including passwords and other sensitive details in an attachment will ensure these always remain within the secure **Work Requests** utility.

Storing Files On Your Campus

Requirements

On-campus file storage requires that your campus configure its firewall so it allows requests:

- Via port 443, 444, 4443 or 8443
- From both of the following Digital Measures IP addresses:
    - 75.102.5.252
    - 75.102.40.10
- To a server that:
    - Runs WebDAV over SSL

> **Note:** WebDAV (Web-based Distributed Authoring and Versioning) is a protocol that enables users to manage files on remote servers. WebDAV must be enabled in order to implement **Mirrored Files**

- Accepts logins using Basic Authentication
- Has sufficient storage capacity on this server to handle all the files your users import

Note: Additional file and directory permissions may need to be configured based on your desired uses for the files stored on that server. For example, backup software may require specific permissions to access your files; publicly available files may require anonymous read-only access.

Your campus will also need to create an account on that server that has full read, write, delete and list access to the account's root directory for Activity Insight to use.

Warning: The files stored using **Mirrored Files** are accessed through Activity Insight but stored locally on your campus servers and managed by your campus's technical staff. These files should be backed up regularly by your campus. Also, files that are stored by Activity Insight should be managed exclusively through Activity Insight.

Implementation Details

Once they have completed the required steps, your technical staff will need to provide you the following technical details for the file storage server:

- The server's full domain name or IP address
- A directory to store files within

Note: Please do not use the root directory. Also note that the path chosen must be instrument-specific. If you are implementing **Mirrored Files** for multiple data collection instruments, you will need to create a unique, non-nested directory for each instrument.

- A username and password for the account the Activity Insight server is to use
- The SSL certificate for your server - an X.509 certificate chain, encoded as ASN.1 DER if using a campus certificate authority or self-signed certificate

Once you have received this information and are ready to implement **Mirrored Files** submit a General work request with the above information to Digital Measures.

> **Warning:** The password for the account Digital Measures will use to access your server should be submitted in an attachment to the work request, rather than in the work request note itself. When Digital Measures responds to one of your work requests, a notification email is generated and sent to your email address to alert you that the request is awaiting your response. This notification email will include the text from the original work request note. As attachments to work requests are never included in the notification email, including passwords and other sensitive details in an attachment will ensure these always remain within the secure **Work Requests** utility.

Server Certificates

As a security measure, Digital Measures require a SSL certificate to put WebDAV in place. This requirement ensures a connection is, indeed, being made to the appropriate server. Activity Insight has a repository of trusted certificates and, thus, Digital Measures will not connect to a server unless that certificate is on the list of trusted servers.

Digital Measures supports the following certificate authorities, in order of preference:

1. Any certificate authority trusted by the Mozilla project
2. ipsCA, which currently offers free certificates to educational institutions
3. A campus certificate authority
4. A self-signed certificate

> **Note:** Options 3 and 4, above, require your Digital Measures Administrator to perform ongoing work. Digital Measures must be provided with the full chain of X.509 certificates in ASN.1 DER format to connect to your WebDAV server, and must be notified each time any of the certificates in the chain are renewed or replaced.

Your campus's server certificate can be self-signed.

Server Space

In determining the amount of server space your campus should allocate to **Mirrored Files** it is advised that you consider a number of factors:

- The number of users that will be storing files to the server
- The types of files that will be stored

> **Note:** Audio, video, and image files may require more storage space. Any file type restrictions you chose to implement will apply to **Mirrored Files** as well.

- The size of the files that will be stored
- The number of files each user will store
- When users will be storing files

These factors will help you determine how much space you should provide for the first year. After the first year has passed, it is suggested that you reevaluate your file storage needs and adjust accordingly.

As a very general rule of thumb, you will likely not need more than several gigabytes of space for the first year.

If you are uncertain of how much space to allocate, err on the side of caution and allocate more space than you suspect is necessary.

Web Services

An optional part of your Activity Insight setup enables you to pull data directly from, and push data to, Activity Insight in real time.

Digital Measures supports interoperability and automation with your existing systems via **Web Services**, an open standard that enables different systems to exchange information easily and securely. Through **Web Services** you can:

- View your Activity Insight instrument configuration
- Import and export data
- Create and manage user accounts
- Assign and manage security roles

> **Note:** For security reasons, some functionality is not accessible through **Web Services**, such as deleting records and changing permissions assigned to security roles.

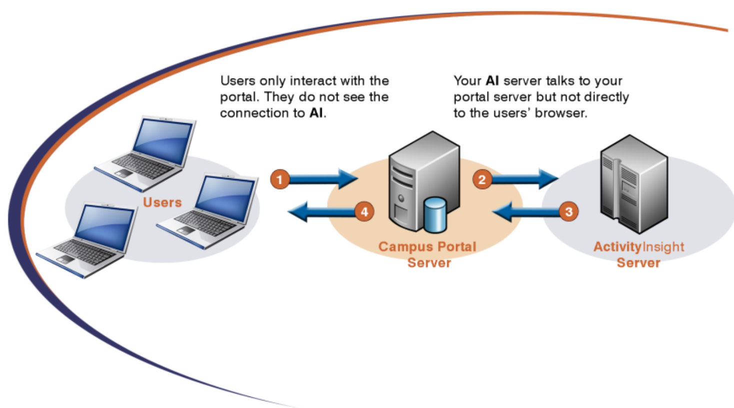


*Figure 5 - Pulling Activity Insight Data through **Web Services**.*

Integrating Activity Insight data into your campus systems will require developing the solution to do so. This requires technical knowledge of web application programming and **Web Services**. Your technical staff can tell you the level of effort that will be required to accomplish what you have in mind.

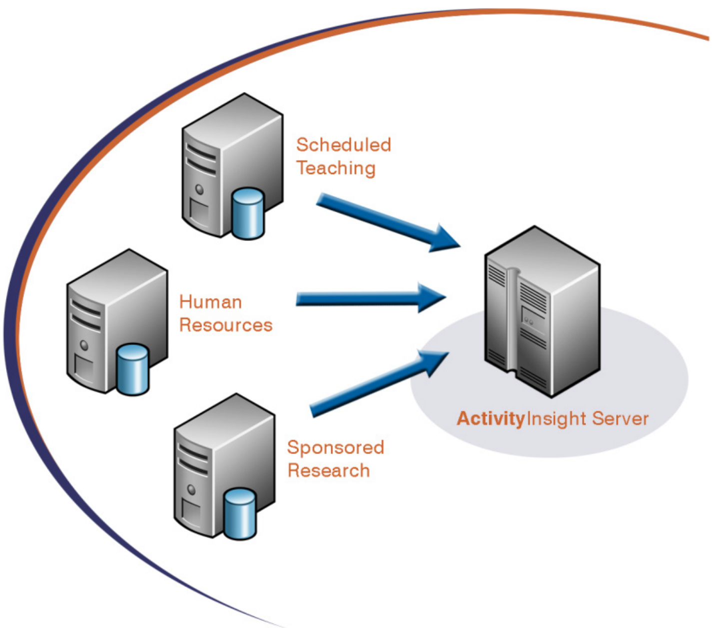


*Figure 6 – Pushing Data to Activity Insight Using **Web Services**.*

For example, your campus may have course data in a course management system. Your technical staff can create a script that will gather information from your course management system and import it into Activity Insight on a scheduled basis using **Web Services**.

Consider loading the following from your existing systems:

- Basic employee data, like name, address, telephone number
- Rank and tenure data
- Scheduled teaching information
- Grants and contracts information

The more data you can retrieve and import from your existing systems, the less work that users must do entering data.

For more information about the **Web Services** platform, download the **Web Services** documentation from your **Dashboard**. See *Chapter 2: Navigating ActivityInsight* for more information.

Appendix A: Sample Broadcast Email

Sample Broadcast Email Text

Hello,

We are implementing a new software system, Activity Insight from Digital Measures, to organize and build reports on our teaching, research, and service activities. This system will enable you to keep track of your activity information just once so that many reports can then be generated, such as annual activity reports, promotion and tenure documents, your vita, and more. It will also assist us in responding to requests for faculty-related data, rather than needing to continually ask you for the information. This will, ultimately, enable us to better communicate about your accomplishments.

Activity Insight is a customizable software solution used by more than 1,500 campuses in more than twenty-five countries. As it is customizable, we can tailor it as needed on an ongoing basis. In determining the data we want to collect within Activity Insight, initially we made it a point to only collect that information we know will be needed. What we want to stress is that if you enter the information into this system one time, we will never again ask for it.

Activity Insight is now ready for you to use. Some preliminary information has already been entered for you, such as your hire date, the dates you attained certain faculty ranks, the courses you have taught, your intellectual contributions, and your education. To access Activity Insight, visit our portal and click the link “Faculty Activity Reporting.”

After you access Activity Insight, you will see the Digital Measures “Manage Your Activities” page. There are two resources available at the top of this page: a video and a one-page user guide. You should begin by investigating each screen on the “Manage Your Activities” page to gain understanding as to the type of data each collects. There you will see the data that have been entered for you, and you should ensure the information is correct. Be sure to save any changes you make. You do not need to fill in every field on each screen; only those that apply for the item you are entering. You can edit the information in Activity Insight at any time.

If you have questions about Activity Insight, you can use the "Contact our Helpdesk" feature to contact Digital Measures helpdesk, or feel free to contact your department chair or me.

Soon, we’ll be able to simply press a button to access the documents and data we need. I’m certain you’ll agree that this, and the other efficiencies afforded to us by Activity Insight, will most certainly be worth this initial effort.

Sincerely,

Your Digital Measures Administrator

Reference

Glossary

A

Administrator	A user appointed by the institution to perform administrative duties in Activity Insight. The duties and scope of an administrator will vary dependent upon the user's permissions.
ancillary file	A file that is supplementary to a main data import file.
authentication	The verification of the identity of a user.

B

Beta Environment	A test environment, primarily used for **Web Services** testing.

C

checkboxes	Field type of boxes that are selected or cleared to turn a value on or off. More than one value can be selected.
Collaborator Name Parsing	Functionality that divides a list of names into individual DSA records.
configuration	The way in which an instrument is set up.
Configuration Report	A spreadsheet that can be downloaded from the **Dashboard**, which outlines the way in which an instrument is set up.
CSV	Comma separated values. A file format in which each line is one record and the fields in a record are separated by commas. Also referred to as "comma-delimited."

D

date field	A combination of month, date, term, or year fields. The date field enables users to enter a date by picking the month or term from a drop-down list and typing the day and/or year into a text box with validation rules.
drop-down list	List of predefined values from which users can select only one value. The drop-down list ensures data integrity and consistency, and limits input values to those designated by your campus.
dynamic screen	A screen used to collect data that are asynchronously changed as further updates to the information become available. Dynamic data are distinguished by continuous activity or change that is tracked over time. Multiple records can be created on a dynamic screen
dynamic sub-answer (DSA)	A field type that enables users to create multiple records within a record. Enables users to associate

	one record with multiple sub-records.

F

firewall	A part of a computer system or network that is designed to block unauthorized access while permitting authorized communications.

H

help button	A field type that opens a pop-up window with content appropriate for the context. Cannot be added to the **Main Menu** or to summary screens.

I

insignificant date	Date fields that are simply another data element of a record and are not used to determine whether or not a record is included on a report.
instrument	The collection of screens and fields through which data are collected and reported together with the structure for storing the data.

L

LDAP Authentication	Lightweight Directory Access Protocol. An application protocol for querying and modifying directory services running over TCP/IP to authenticate users. Digital Measures supports LDAP authentication through remote authentication.

M

Mirrored Files	An additional feature that enables you to create a local backup of files stored through Activity Insight or make them publicly accessible.

N

numeric field	Field type of numerical values with validation rules: integers, decimals, percentages, or currency.

P

parameter	A variable that can be given a specific value when a report is generated.
password	A confidential sequence of characters that a user must enter to gain access to a file, application, or computer system.
PasteBoard	Enables users to easily copy up to 4K worth of text from another document and drag and drop the text into a field in Activity Insight. Available only from the expandable tray on the **Manage Your Activities** page.
permission	The ability to access a utility.
primary key	One or more fields on a table used to uniquely

	identify each row in a table.

R

Rapid Reports	Provides a way to quickly and easily run custom reports on the data in Activity Insight from the same pages into which you enter data. Available only from the expandable tray on the **Manage Your Activities** page.
Record Reference	Creates an association between two records. List of references to records entered by the user in another screen, from which the user can select a value and thereby associate one record to another.

S

security role	Used to assign security access to users within Activity Insight. Security roles are comprised of permissions, which correspond to utilities. The scope of a user's permissions can be assigned at the campus, college, department, and individual levels.
significant date	Date fields used to determine if a record will be included on a report.
significant ordering	Functionality that can be enabled within a dynamic sub-answer (DSA) that enables users to change the order of DSA records.
static screen	A screen used to collect persistent data, which are data that are fixed and not likely to be modified, and for which any incremental modifications do not need to be tracked over time. Only one record can be entered on a static screen.
store file	A link field type that enables users to upload a file in Activity Insight. Creates a central repository of teaching, research, and service related files.
summary screen	A screen that shows all the records entered for the user on the screen selected from the main menu. Records are displayed in chronological, alphabetical, descending order, based on the record's end date, beginning date, and summary screen text.

T

text area	A field type composed of multiple lines of up to 20,000 characters.
text box	A field type composed of a single line of characters.

U

unit	Typically referred to as a campus, college, school, department, division, institute, center, etc.
URL field	A text box field type preceded with http://. Used to enter a web address.
user account	Identifies a user by their unique username. For security purposes, users are required to authenticate

	themselves with credentials.
user attribute	An element of a user account that associates a user with a security group. User attributes are set from the **Users and Security** utility when a user account is created and can be modified from a user's most recent Administrative Data – Yearly Data record. In Activity Insight, the default user attributes are college and department.
user identifier	A name or number that is unique to a particular user. This is the username or an identifier secondary to username. Can be used for importing data.
user reference	A drop-down list field type of your instrument's user accounts. The institution should specify whether the creator of the record or all users associated with the record should have the ability to edit/delete the record.
User Setup Template	A template that captures basic user account information, which can be used to create user accounts in bulk.
username	A name or number that is unique to a particular user. Used for authentication and/or importing data.
utility	Key functionality of Activity Insight.

W

Web Services	An open standard that enables different systems to exchange information easily and securely.
WebDAV	Web-based Distributed Authoring and Versioning. A protocol that enables users to manage files on remote servers. WebDAV must be enabled in order to store files on your campus through **Mirrored Files**.
Work Requests	The formal method for initiating work to be completed on your behalf by Digital Measures. Work requests are used to request screen revisions, submit data import files, submit reports to be built, and revisions to existing reports; and change the permissions of Activity Insight security roles.

Y

yes/no field	A drop-down list field type with yes and no values. Used to answer a yes/no field.

Index