

## **Quick Tips for Department Heads/Deans Using Activity Insight (AI)**

1. **Producing your own individual annual report:** Please see “*Quick Tips for All Users*” on the Provost’s website for managing your own data and creating your individual annual report.

2. **Creating Your Departmental Annual Report:**

- In “**manage activities**,” from the main menu, select “**Administrator Narratives**.” Be sure to enter “**Academic Year**.” Enter text in the fields and “**save**” your work.
- There may be times when some of the previous year’s information is still relevant, so it might be helpful to simply copy it for the new year and then make needed edits. To copy a record, select “**Administrator Narratives**” (or other appropriate link from main menu). From the list of existing records, select the one which you wish to copy and then click on “**duplicate**” button. For example, if much of what I wrote for 2015-16 in a particular screen is still applicable for 2016-17, I would check the box for 2015-16, hit “**duplicate**,” and a new record is created with that previous year’s material. THEN, I HAVE TO SET THE NEW YEAR FOR THIS RECORD—2016-17 (or whatever the current year is). Now, you can go back in at any time to this 2016-17 record and revise as desired (making sure you save as you do).
- “Help” boxes (? Icon) with suggestions for material you may want to include in the particular fields are available for all items in the “administrator narratives” screen.

3. **Commenting on the annual reports of faculty/staff who report to you:**

- In AI, click on “**manage data**” from menu on left. Choose user and hit “**continue**.” This will open up a new window.
- From main menu, find and select “**Chair/Dean comments**” toward bottom. You want to “**add new item**” (unless you’ve already started it) and then in the resulting screen you **MUST** enter the academic year and type in your comments. Be sure to “**Save**” and the comments will appear in that person’s annual report.
- If doing more than one, you can close that window to return to where you can select another of your faculty/staff.
- Your faculty/staff should indicate that they have read your comments. (Note: Individual faculty/staff should get into AI and go to “**Chair/Dean comments**” from Main Menu to read your comments. Then, in that screen, there is a field where they can indicate that they have read the comments plus respond if they wish to do so.)

4. **Running Reports:**

There are a variety of reports that AI provides that you will be running from time to time. The most common will be these two:

A. Individual annual reports for one/some/all people in your unit:

- Select “**Run Reports**” in menu at left
- **Step 1:** Select “**annual report for faculty**” (or professional staff depending on your unit) from the drop-down menu. (Note: If you wish to see the details of how this report is compiled (i.e., what data elements are used), select “**Download this report’s template**”)

- **Step 2:** Select date range for the report. Typically, this will be our reporting year cycle—July 1 through June 30, and these are now the AI default dates. If you need other dates for whatever reason, you’ll have to reset.
- **Step 3:** AI’s default is to include all enabled user accounts from your unit in a report. If this is what you want, go to Step 4. However, while someone may be an “enabled user” in the database, often times personnel change from year to year (even semester-to-semester). We try to keep up with those changes but it is difficult. You may want to review who is in the list. To do so, click on “**Change selection**” which will open the “**Individuals or groups to include**” pop-up window. Choose “**Individual**,” and you’ll see a list of enabled accounts in your unit. From this list, you can choose who you do or do not want included. Click “**Save**” after you’ve made your selection(s).
- **Step 4:** Choose the file format and page size you prefer. Then hit “**run report.**” AI will build your report and you will be prompted to either open or save it locally.

The resulting file, if you’ve chosen more than one person, should be a compilation, in alphabetical order, of your faculty/staff’s annual reports.

- B. The other custom report that you will use most frequently probably is the “Department/School Annual Report.” This report produces a file with your unit annual report from the information you entered in the “**Administrator Narratives**” screen from the main menu. Or, if you have other units who report to you, you may be running it to see their reports. Running it is done through the same steps as outlined above. In step 3, however, you’ll be choosing units, whether your own or others in your area, rather than individuals. If you select “**change selection**,” you will see a box where you can make choices at the “college,” “department,” or “individual” level. Depending on your position (e.g., dean vs. chair), you’d select “college” (for deans) or “department” (deans or chairs might do this).
- C. If there are other reports you want to run to help you work on your departmental report, just select it at Step #1. The other steps will be largely the same, although with some there will be other choices to make. Here is a listing of some in which you might be interested (labels should be self-evident):
- Contracts, Grants, & Sponsored Research
  - Creative Works
  - Editorial & Review Activities
  - General Service
  - Intellectual Contributions
  - Presentations
  - Scheduled Teaching
  - Student Scholarship
  - Summary of Faculty/Staff Scholarly & Creative Accomplishments

## 5. *Running Your Own Ad Hoc Queries:*

You can see from the list above that there are many specific activities at which you can look. AI also offers the ability to generate other, ad hoc reports. The difference between an ad hoc query and what’s above is that the latter have been built in pre-defined ways to select only certain elements from the AI database. Running your own ad hoc query lets YOU CHOOSE what data element(s) you want from the entire database. To run:

- Select “**run reports**” from menu on left, and in resulting drop-down menu, choose “**create a new report.**”

- Step #2 – Choose dates desired (default is the current reporting year).
- Step #3 – Choose what individuals/units you want in the report (AI default is to include all enabled users). Hit “**change selection**” and follow steps described above in Step 3 for running annual reports.
- Step #4 – Here you select the data elements you want. Typically, you’ll want some subset rather than all. Hit “**change selection**” and make choices from pop-up window. Deselect “all.” Then you’ll probably be choosing from “common items.” Clicking on headings or “+” boxes will expand/collapse the lists of data elements. Continue to drill down through these as appropriate to get to the element(s) you want. Once you’ve found the item(s), check its box (or click box by heading for “all” in that section). Click “**save**” at bottom and AI returns you to the steps.
- Step #5 – Grouping method (I really have not used that functionality)
- Step #6 – Offers an optional search feature
- Step # 7 – Choose the file format you prefer. I usually do the default format of .csv because I often want to do subsequent filtering with the data.
- Hit “**run report.**” If you think this is a query you may use again, you can save it so you don’t have to go through all of these steps necessarily (e.g., you may need to change the date). Give it a name and it should appear in your list of reports to run in the future.