ACTIVITY INSIGHT QUICK-TIPS and FAQs

General Tips for Using Activity Insight (AI):

1. Most important, record your activities as the year progresses. Don't wait until May when your annual report is due. This can be done in AI as the year goes on, or you could store the bits and pieces of information in some other document (e.g., Word).
2. Appropriate web browsers for using AI are as follows (as of 3-30-17):

Browser	Operating System	Versions
Google Chrome	Windows Mac OS	Version 41 +
Mozilla Firefox	Windows Mac OS	Version 36 +
Apple Safari	Mac OS	Version 9 +
Microsoft Internet Explorer	Windows	Version 11
Microsoft Edge	Windows	Version 0 +

3. Logging in to AI: Go to https://www.digitalmeasures.com/login/brockport/faculty/authentication/showLogin.do;jsessionid=31B0574BD89E3D451F737482456F2B3E
   Bookmark this address for future use. Or, from the College's homepage, you can also find your way to this address by going to Faculty & Staff→Academic Affairs→Annual Report→Activity Insight Login. Use your campus netid and password to log into the system.
4. When you login, you will be in "manage your activities," which is the primary functionality for all users (highlighted in menu on far left). Here, you will also see the main menu of links for screens (e.g., links under "General Information"). Clicking on these takes you to screens where you can "add new item" (i.e., create new record for the current year). You can also copy ("duplicate") or delete ("trash can" icon) existing records. More is said below on duplicating.
5. There are a variety of ways data are input into AI. Fields of some screens are populated automatically as we send information from our institutional databases to AI. There are also many fields where one can select what to enter from drop-down menus and others where you enter the information in a text field. For this latter type of material, to be sure

it does not get lost in case there's a mistake, we suggest you have it in a Word document from which you can cut-and-paste directly into the fields. Alternatively, AI has a "Pasteboard" (available as option under "manage activities") that can be used for the same purpose. AFTER YOU MAKE ANY ENTRIES, YOU **MUST** CLICK THE "SAVE" BUTTONS AVAILABLE AT TOP OF THE SCREENS. If you don't, you will lose that data. If that were to happen, and you had it originally in Word or the 'pasteboard,' then you won't have to recreate it again from scratch.

<u>What Data Do I Enter & Where Do I Enter It?</u>

1. Enter relevant data reflecting what you have accomplished in the reporting cycle in question. **<u>IMPORTANT</u>**: Dates are required in most screens!! In some of these, you'll set the date from a pull-down menu; in others, you have to enter it manually. Dates, in part, determine what information is "grabbed" for particular Annual Reports.
2. There are places in AI where 'help' boxes exist to give you some suggestions for material you might include in that particular field. These are indicated by the "?" symbol.
3. There may be times when information entered for a previous year hasn't changed much and, to save some time, it might be helpful to simply copy it for the new year and then make needed edits. To copy a record, select 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 is still applicable for 2016-17, I check the box for 2015-16 record, hit "duplicate," and a new record is created with that previous year's material. BUT, I HAVE TO SET THE NEW YEAR FOR THIS RECORD—2016-17. 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).
4. You may enter basic pieces of data in the screens for "personal and contact information" and "yearly data." You should definitely enter your "faculty/staff status" in the latter screen.
5. **<u>Specific user groups</u>**:
    a. **Regular faculty –** The most important screens are:
    - General Information
        - Permanent and Yearly Data
        - Faculty/Staff Development Activities Attended
        - Faculty Narratives
    - Teaching—screens as needed (**<u>Note:</u>** We import much of the data for fields in "Scheduled Teaching" [Course and section numbers, title, credit, enrollment, and grades as available]; but there are fields you must fill, notably whether the course had a service learning component, and your IAS scores).
    - Scholarship/research—screens as needed
    - Service—screens as needed

b. **Adjunct faculty** (if you have taught at least 2 courses) – Most important screens are: 1.) “faculty narratives” under the “General Information” section and “Scheduled Teaching” under “Teaching” section (**<u>Note:</u>** Much of the data for fields in “Scheduled Teaching” [Course and section numbers, title, credit, enrollment, and grades as available] will have been populated); 2.) other screens under “Teaching” may be used if relevant (e.g., taught an independent study or had advising responsibilities, etc.); 3.) while not obligated to report these activities, one can enter data into screens under “Scholarship” or “Service” if needed.
c. **Professional staff –** Enter data in the Permanent and Yearly Data screens, Faculty/Staff Development Activities Attended, and Professional Narratives. Also enter teaching, scholarship, and service information if applicable.
d. **Unit heads –** Enter information for your individual annual report using the screens for the group you belong to above. Unit annual reports are entered in the “administrator narratives” screen.

How do I run my Annual Report?

Depending on how your supervisor works this process, you may need to generate the Annual Report and provide them with an electronic copy. There may be other times where you simply want to run the report yourself to see that it looks the way you’d expect, or you’re doing it to have a copy for your own records. Regardless, the Annual Report can be generated one of two ways. First, click on “Rapid Reports” under “manage your activities” and select the appropriate annual report (there’s one for faculty and another for professional staff). Enter the appropriate dates. (Note: Our college reporting cycle is July 1, – June 30. Once you’ve used “Rapid Reports,” the dates set will be “saved” for the next time in. Just pay attention to what those dates are and what you need.) Select the format for the report (default is Word) and hit “run report.”

Alternatively, you can also generate your annual report by selecting “run reports” from menu at left of AI main screen. Subsequent steps are same as above. Hit “run report” in upper right.

Why don’t I see some of my information in the Annual Report?

1. The Annual Report is configured to draw only particular elements from AI. Not all screens from the AI menu, nor all fields from specific screens, are used. Essentially, as currently configured, it is meant to reproduce our historical annual report form, although some additional prompts have been added.
2. ***If you didn’t save it, it won’t be there.***
3. Whether or not it appears in a particular reporting cycle is, as noted above, dependent on dates entered. It’s possible that, for those activities where a date range was entered, if the starting/ending date is outside the annual report timeframe specified, it may not appear.

4. If you produce your Annual Report as a Word document, and then you make changes in said document, ***THOSE CHANGES WILL NOT APPEAR IN THE AI DATABASE***. You've only changed the report, not the underlying data. So when you go to run the report again, you won't see the revisions. You have to revise what's in AI.

Is there anything else I need to do with my Annual Report?

1. When you have submitted your annual report to your Chair/Supervisor, he/she will enter their comments. To read their comments, select "Chair/Dean comments" from the Main Menu. In that screen, you can read their comments. There is also a field there to indicate that you have read the comments and another to respond if you wish to do so.