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Introduction

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Introduction

Welcome to Activity Insight™!

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 schools and colleges 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’s external web site, 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 biographical sketches 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 user’s 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, so they can better publicize the accomplishments of their users.
About DigitalMeasures

DigitalMeasures makes web-based software for higher education. We were 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 U.S. Today, our flagship solutions are trusted by more than 1,500 schools and colleges in more than 25 countries. The focus of our solutions is on making it easy to collect information from a broad base of people so that powerful reports can be generated. Each of our solutions perfectly fills the need for which it was designed; they can be tweaked and tailored to meet your exact needs.

Our aggressive growth is fueled by one simple fact: our clients are the focus of everything we do. Each solution we develop is fully customized to meet that client’s needs, and we constantly utilize user feedback to improve functionality and drive development.

In addition, DigitalMeasures’ 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.

Database Type, Servers and Security

DigitalMeasures uses PostGres as our database; however, you will never need to work with the data in the form in which it is stored in our database, as the data are stored in a quite complex schema to accommodate the customizations that we make for each of our clients. When you are working with your data, you can download your data 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. Either way offers a very simplified view of your data, making it easier to work with and use.

Our servers are managed by Sun Microsystems in a Sun owned and managed datacenter. The following security measures are in place:

- 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.

We also have a warm standby site always running in case a disaster takes place at our primary datacenter. If this were to happen, we are able to failover to this standby site in approximately 15 minutes to a read-only version of the system, losing no more than five minutes worth of data. During this period, we will make the determination as to whether we would restore service to our primary...
datacenter, or whether we need to make our standby datacenter our interim primary datacenter. In the first case, full read-write service will be restored to your data and no data will have been lost. If the latter, read-write service will be instituted, losing five minutes or less of data, as this is the delay between synchronization between our primary and standby datacenters’ servers.

In addition to these security measures regarding our servers, we also perform secure nightly backups to five geographically dispersed locations owned by Sun and Iron Mountain. In addition to these backups, you are able to download a full copy of all of 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.

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

Privacy Statement

DigitalMeasures takes the privacy of our clients and their users seriously. Our privacy statement, available by accessing the Privacy Statement from the Left-Hand Menu in ActivityInsight, details the steps we take to keep your data safe and secure.
About This Guide

This guide provides administrators with the information that 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 manipulate data in Excel® or some other spreadsheet application
- Know how your campus works and the realities of your campus
- Have a high-level understanding of relational databases

Strong technical knowledge of web applications or programming is not required. However, some technical understanding of your current systems will be helpful.

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

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

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

- steer the setup and launch of ActivityInsight;
- bring together the necessary technical and human resources;
- coordinate testing of your customized ActivityInsight with pilot groups;
- set launch timelines;
- provide overall direction on the setup of ActivityInsight for your campus.

For more information on the ActivityInsight University Administrator role, see “Managing Security Roles” on page 53.

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

- Basic understanding of data structures, such as database tables and primary keys, one or more field on a table used to uniquely identify each row in a table
- Ability to obtain and manipulate data files that include information such as the current class schedule, so that the data can be imported into ActivityInsight
- Ability to work with groups from across the entire campus in a fruitful way
- Ability to pass more complex technical documentation to more technically oriented individuals on your campus so they can put features in place
- Speak about the technical issues of ActivityInsight 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 ActivityInsight 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 ActivityInsight is in place.
Unit Administrators
In addition to your ActivityInsight University Administrator, we recommend asking each of the colleges/schools/departments/divisions, or units, at your campus to appoint a liaison to advocate the data collection and reporting needs of their college. This person should have the same skills as the University Administrator.

Setting Up ActivityInsight for a Single College
The role of your ActivityInsight College Administrator will closely mirror the role of the ActivityInsight University Administrator. However the amount of time required to successfully launch ActivityInsight will be significantly less than that required for a campus-wide launch.
Choosing Your Configuration

When multiple units on a campus work with ActivityInsight, you will need to decide whether they will be set up with one or separate instruments. This section will help you to 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 one or multiple instruments is the right way to proceed: *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 DigitalMeasures 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 ActivityInsight is required to act as a “clearinghouse” for customizations.
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- 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 Linking User Reference (see page 93) works only for forms without unit-specific customizations.
- Only one File Storage server can be in place per instrument. (File Storage enables users to supplement the activities stored in **Activity Insight** by uploading files through **Activity Insight** but storing the files locally on your campus.)

**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, only unit-specific customizations of the user’s primary unit are visible to the user.

**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 File Storage server can be in place per instrument. (File Storage enables users to supplement the activities stored in **Activity Insight** by uploading files through **Activity Insight** but storing the files locally on your campus.)
- Editable Linking User Reference (see page 93) works only for screens without unit-specific customizations.
- Only one File Storage server can be in place per instrument. (File Storage enables users to supplement the activities stored in **Activity Insight** by uploading files through **Activity Insight** but storing the files locally on your campus.)

**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 will collect within ActivityInsight.

Pros
- Central administration of ActivityInsight is not required. Each unit can administer ActivityInsight 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 File Storage server for their respective instrument.

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 (see page 93) only works for users who have an account in the instrument.
- 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 ActivityInsight centrally, your University Administrator will need to implement and manage multiple instruments rather than a single instrument.
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Getting Help

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

- The Resource Center (see page 33) provides additional documentation and a forum that enables you to connect to other DigitalMeasures clients to exchange ideas.
- The Contact Our Helpdesk and Submit Your Feedback (see page 34) utilities enable you to submit inquiries directly to DigitalMeasures' helpdesk.
- DigitalMeasures technical support line: (866) 348-5677 (toll-free within the United States) available 8:00 a.m. to 5:00 p.m. (CT), Monday through Friday.
- Your DigitalMeasures Client Manager can provide guided tours of ActivityInsight, explain features, and share advice on implementation approaches. Call or email your Client Manager anytime you need assistance. You should have received your Client Manager’s contact information when you signed on with DigitalMeasures. If you need assistance finding your Client Manager, select Contact Our Helpdesk in ActivityInsight Left-Hand Menu, or contact the DigitalMeasures technical support line.
Training

Whether you are new to ActivityInsight or an experienced user who needs a refresher, DigitalMeasures offers flexible training options. For a fee, we will train individual users on ActivityInsight through instructor-led online classes or on-site at DigitalMeasures’ headquarters.

DigitalMeasures can even come to you to train your administrators or users in private classes, for a fee.

For further information regarding training, contact DigitalMeasures’ training at training@digitalmeasures.com.

**Note:** A video and guide on how to use Manage Your Activities are also available on-demand to your users from the Manage Your Activities screen.
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Dashboard
Manage Your Activities
Manage Data
Run Ad Hoc Reports
Run Custom Reports
Usage Statistics
Users and Security
Work Requests
Resource Center
Other Left-Hand Menu Links
Navigating ActivityInsight

Overview of ActivityInsight

ActivityInsight is made of many different components. All of them share common basic elements (see above).

1. Your campus’s logo.
2. A personal welcome message.
3. The Left-Hand Menu for ActivityInsight (described below). The background color 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 DigitalMeasures selected for your institution, submit a General Work Request that includes the hex code to be used and/or the JPEG file of the logo (60px high x 250px wide maximum).

Left-Hand Menu

The Left-Hand Menu is on all ActivityInsight 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
Navigating ActivityInsight

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 ActivityInsight security role.

- **Setup**: View the seven steps in the setup process.
- **Dashboard**: Track key aspects of ActivityInsight.
- **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 ActivityInsight using the parameters you identify.
- **Run Custom Reports**: Run reports based on templates.
- **Usage Statistics**: View statistics on the use of ActivityInsight by your users.
- **Users and Security**: Edit user account information, or create, delete or disable user accounts.
- **Work Requests**: Submit requests to DigitalMeasures to modify ActivityInsight for your campus, view the status of open requests, view completed requests and receive feedback and helpdesk inquiries from users.
- **Resource Center**: Connect with other DigitalMeasures clients to exchange ideas and access documentation.

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

Setup

The Setup utility outlines the seven 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 ActivityInsight demo, the ActivityInsight 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 “Setting Up ActivityInsight” on page 37.
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Dashboard

The Dashboard utility shows you important details about your ActivityInsight instrument at a glance. Every time you access the Dashboard it is refreshed to reflect your campus’s most recent activity in ActivityInsight 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 (see page 128) alerts you to optional functionality that can be added at no additional cost. Usage Statistics (see page 30) provides a snapshot of your campus’s use of ActivityInsight at that point in time.

This is also the utility from which you can download the most current version of the ActivityInsight Administrator’s Guide and the current Configuration Report (see page 81) of your ActivityInsight instrument.
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 can be customized to include any text you wish to communicate to your users. By default, the text contains links to faculty training materials, including a two-page Faculty Guide and a seven-minute faculty training video.

An expandable window, available only from the *Manage Your Activities* page, 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** provides a way for you to quickly and easily run custom reports on the data in the system. 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. Reports that are configured with a Microsoft Excel® option have default parameters in place, such as citation styles, or have non-standard parameters in place are not currently available from the **Rapid Reports** utility.
The PasteBoard enables you to copy up to 4K (4,000 bytes) worth 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.

If users report difficulties using the PasteBoard, there are a couple of common tips we have for troubleshooting. Instruct the user to:

- clear their browser cookies and restart their browser;
- ensure 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 (remembering the 4K size limit).

You may copy and paste special characters—such as Greek or Latin characters, accent marks or other diacritical marks into the system 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 the system 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 the system.

For more information on customizing the screens and fields that collect this information, see “Customizing Screens and Fields” on page 80.
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Manage Data

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 Users enables you to access another user’s activity data, as your security permissions allow. Manage Administrative Data for Users enables you to easily copy all users’ Yearly Data records (for whom you have permission) from one year to the next, or update users’ Yearly Data records from a central location.

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

The Run Ad Hoc Reports utility 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 seven steps to running an ad hoc report. Each step helps you create and define the parameters that will be used to construct the report.

For more information, see “Running Ad Hoc Reports” on page 104.
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 ActivityInsight, as well as custom reports that you have had built into your instrument. 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” on page 109.
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Usage Statistics

The Usage Statistics utility

Usage Statistics provides a snapshot of your use of ActivityInsight 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 drill into and view the statistics on a user-by-user basis.

Note: If you need further details regarding changes that users have made, or which user made a specific change to a record in the system, please contact us and request an audit of that user or record.
The **Users and Security** utility enables you to manage user accounts for which you have permission to do so. 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 (for Local Authentication only);
- review your campus’s security roles and their permissions;
- download all user information, including Default Passwords (for Local Authentication only).

The bottom section of the **Users and Security** page lists all the user accounts to which your account has access. Selecting the pencil (edit) icon for a user enables you to perform functions specifically for that account. This enables you to request the account’s password be emailed to its email address, update the account’s details, and enable/disable or delete the account.

For more information on managing a user’s activity entries using **Manage Data**, see page 27.

For more information on Managing Security Roles, see page 53.

For more information on Managing User Accounts, see page 62.
Navigating ActivityInsight

Work Requests

When using ActivityInsight, your users may ask for changes they would like to have made to it. To request a change, select the Work Request utility. A Work Request is the formal method for initiating work to be completed on your behalf by DigitalMeasures.

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 DigitalMeasures 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;
- change the permissions of ActivityInsight security roles;
- request additional revisions that should be made to your system.

For more information, see “Managing Work Requests” on page 112.
Navigating ActivityInsight

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.
Other Left-Hand Menu Links

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

Contact Our Helpdesk and Submit Your Feedback

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

The Contact Our Helpdesk page

All ActivityInsight users can send comments and other feedback by selecting Submit Your Feedback.

The Submit Your Feedback page
Navigating ActivityInsight

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

Alternatively, all Contact Our Helpdesk and Submit Your Feedback inquiries can be sent to a single, specific email address. This can be configured at the login page or institution level. To implement this configuration, submit a General Work Request that includes the specific email address to which Contact Our Helpdesk and Submit Your Feedback inquiries should be sent.

The text displayed before and after submission on both the Contact Our Helpdesk and Submit Your Feedback pages can be customized. However, these utilities cannot be renamed.

Note: Unlike the Contact Our Helpdesk and Submit Your Feedback links within ActivityInsight, all inquiries and feedback submitted from the login page are directed to DigitalMeasures.

Change Your Password

The Change Password page

At any time you are logged into ActivityInsight, 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 either Portal or LDAP Authentication do not have the option to change or request their passwords.
Navigating ActivityInsight

**Logoff**

![Logged Off confirmation page]

**The Logged Off confirmation page**

_**Logoff**_ will log you off of _ActivityInsight_. You will have to again authenticate to begin a new _ActivityInsight_ session. Sessions automatically time-out after 90 minutes of inactivity. If you are using Portal Authentication, when users log off they will be redirected to the URL provided to _DigitalMeasures_ when you implemented Portal Authentication.

**Warning:** If you are using Portal or LDAP Authentication, selecting _Logoff_ in _ActivityInsight_ will **not** log you off your campus’s portal.
Setting Up ActivityInsight

Overview of the Setup Process
Planning for ActivityInsight Integration
Step 1: Submit a Completed User Setup Template
Step 2: Submit the Reports You Would Like to Build with the System
Step 3: Put File Storage in Place (Optional)
Step 4: Put Advanced Authentication in Place (Optional)
Step 5: Prepare the Instrument for Your Faculty’s Use
Step 6: Submit Data to Have It Loaded
Step 7: Announce the System to Your Faculty
Overview of the Setup Process

ActivityInsight 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 ActivityInsight. Colleges and departments comprising your campus may have particular needs for reporting due to accreditation requirements or the unique situation of that unit. Customizing ActivityInsight 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 ActivityInsight at your campus, and the amount of data already in electronic format at your campus.

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

- importing data into ActivityInsight;
- setting up File Storage for related files, such as syllabi and presentation files;
- implementing Advanced Authentication;
- implementing Web Services to automatically import data in ActivityInsight from your existing information systems or to pull data from ActivityInsight to use in your websites.

The process may require assistance from your information technology staff. If necessary, we recommend contacting them early in the process.
Planning for ActivityInsight Integration

Before you get started with setting up ActivityInsight 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 ActivityInsight instrument need to be working so that 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 it is that your campus will need to provide support in getting the data entered by 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 ActivityInsight will be implemented for your campus?

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

- **Picking college administrators (if applicable):** Will you assign ActivityInsight 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 the ActivityInsight instrument for your reports and data:** What reports do you want ActivityInsight to compile for you? Do your activity data require customizations to the base data elements collected in ActivityInsight?

  DigitalMeasures 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, we recommend against asking faculty to enter their entire vita in the initial data load.

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

Avoid re-entering activity data. If your units already have some of this information stored electronically, it will be easier to import. This can be done by submitting a Data Import Work Request. Your technical staff can also connect your databases to your ActivityInsight instrument for automated updates using Web Services.

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

Many of our 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 the system?

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

- **Authenticating:** Will your users authenticate using an ActivityInsight-specific username and password combination? Or, will you be implementing authentication using your campus credentials (e.g., LDAP authentication) or integrating ActivityInsight 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:** Do you want to use your local servers to store files related to your users’ activities?

By implementing File Storage, you can locally store files such as users’ photographs, course syllabi, full texts of articles, presentation files, etc., and make them centrally available through the ActivityInsight interface.

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

With a little programming using Web Services, you can pull your information from ActivityInsight and show it on your existing web pages to keep users’ profiles updated, for example.
Setting Up ActivityInsight

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

  You will want to pilot your ActivityInsight instrument using real data for at least the past couple of years and by creating real reports. This uncovers any missing elements or needed customizations.

- **Communicating to users about ActivityInsight**: How will you communicate to your users about the ActivityInsight project?

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

- **Training**: How will users be introduced to ActivityInsight?

  Regardless of the approach you use, it is essential to provide clear and easily accessible training to users on ActivityInsight. These sessions can also be used to further communicate the goals of the project, how the data are being used, and the security of DigitalMeasures’ servers. Because each college may have very different needs, we suggest conducting separate training sessions for each. For information on Training options for System Administrators, see page 19.

  Your Client Manager is ready to assist you in every part of your launch process and can provide time-saving ideas from our experience implementing ActivityInsight for many other clients across the globe.

  **Note**: The Resource Center is a great place to gain insight and share best practices with other DigitalMeasures clients on the implementation process.
Setting Up ActivityInsight

Step 1: Submit a Completed User Setup Template

Before your users can start inputting information about their activities, they need ActivityInsight user accounts. Manually entering each user into ActivityInsight, one after another, is tedious and error-prone when you need to create accounts for many users at once. We recommend using a more efficient method, either by supplying your users’ information in a User Setup Template or by connecting your existing systems to ActivityInsight 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 ActivityInsight. Nor can his or her activity data be tracked, since ActivityInsight attaches activities to user accounts. Individuals who may require ActivityInsight 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 ActivityInsight administrator at any level.

For more information, see “Managing User Accounts” on page 62.

**User Setup Template**

DigitalMeasures has made it simple to add multiple users at one time using the User Setup Template (UST). This method of creating accounts is most effective and time saving when more than 25 users need to be created. For less than 25 users, we recommend creating each user 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 page 76.

Collect the information from your existing databases, put it into the spreadsheet, and submit the completed file to DigitalMeasures through ActivityInsight using the Click here to submit the completed template link or as a User Creation Work Request. For more information on submitting User Creation Work Requests, see page 123.

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” on page 54.
Setting Up ActivityInsight

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

DigitalMeasures does a first pass at customizing your ActivityInsight instrument using sample reports submitted by your campus. Having this information will enable DigitalMeasures to customize the various screens of ActivityInsight and create report templates to fit the needs of your various colleges/schools and departments.

Please be as complete as possible in gathering reports. Although you can add new reports at any time, adding new reports 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 DigitalMeasures to ensure that your ActivityInsight instrument reflects the requirements of the reports your campus needs to create.

Therefore, we suggest that in addition to reports that meet your immediate needs, you include reports that your campus's long-term plans require in the future. 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 ActivityInsight. For more information, see “Creating a Sample Mock-Up Report” on page 100.

Each new report must be submitted as a separate Report Setup Work Request (see page 123).
Step 3: Put File Storage in Place *(Optional)*

Your users keep track of their activities with ActivityInsight. As part of the data that are collected, you could use the system to collect files from your users using File Storage. File Storage supplements the activities stored in ActivityInsight by including associated files, such as:

- full-texts of intellectual contributions your users have published;
- syllabi for courses;
- presentation files, such as PowerPoint documents, of presentations your users have given;
- users’ photographs.

The advantage to putting File Storage in place is that it makes supplemental documentation easily accessible by storing it in a central location. The files are uploaded through ActivityInsight, but are stored locally at your campus. When requested, ActivityInsight requests the files from your campus file server. The files appear to be stored in ActivityInsight when, in fact, all that is stored in ActivityInsight are links to the files.

For more information, see "File Storage" on page 139.
Step 4: Put Advanced Authentication in Place (Optional)

The login (or authentication) process is important. It is important to ensure that your ActivityInsight data are secure and that it as easy as possible for your users to access ActivityInsight. Further, the more seamless authentication is for your users, the less likely they are to forget passwords or write them on notes in their offices. Advanced Authentication enables your users to use the same username and password they use for other purposes, such as signing into a portal or accessing their email.

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

ActivityInsight also supports three methods of Advanced Authentication.

- **Shibboleth® Authentication**, the most secure method and the one most convenient for users and administrators – this is the method DigitalMeasures recommends.
- **Portal Authentication**, where users access ActivityInsight through a link in your campus portal.
- **LDAP Authentication**, where users log into ActivityInsight 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. We recommend that the ActivityInsight University Administrator use Local Authentication so that he or she can always access ActivityInsight, even if your Shibboleth Identity Provider (IdP), portal or LDAP servers are down.

For more information, see “Advanced Authentication” on page 129.

**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 ActivityInsight.

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 ActivityInsight requires that users use the ActivityInsight login page.
Implementation Details

Because Local Authentication is the default for ActivityInsight, 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 the system with this default password, users will be prompted to change their password.
Step 5: Prepare the Instrument for Your Faculty’s Use

At various times during your ActivityInsight implementation, you will want to pilot ActivityInsight 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 ActivityInsight instrument to DigitalMeasures as Screen Revision Work Requests. For more information on submitting Screen Revision Work Requests, see page 123.

You may choose to iterate the testing process, starting early in the process 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 ActivityInsight instrument reflects the requirements of your campus.
Step 6: 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 temp workers adds costs, these methods increase the likelihood that your initial launch will be successful.

Determining How Much Data to Include

We encourage you to thoroughly consider how many years of data you need entered for the initial setup and launch, and generally recommend that our clients ask their faculty to enter the last one or two years of their data in their first year using Activity Insight. The amount of buy-in that you will receive for the initiative is very much a function of the amount of work your users are required to perform to comply with the initiative. The amount of work that must be completed to use Activity Insight is strongly correlated to the number of years of historical data that 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 of our clients look to enter between one and 10 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 of our 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.
Setting Up ActivityInsight

Once a user is familiar with ActivityInsight, entering activity data takes approximately 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 of our clients found that users simply were not up to the challenge of entering their initial activity data. By using support staff or students to enter preliminary activity data into ActivityInsight, followed by review and approval from the users, campuses found that their launches went much smoother. It also reduced the time it took to get a base of useful data into ActivityInsight.

The idea is that users will find it easier to work with the preliminary data, approving it and ensuring that it is both complete and correct, than do the “tedious” administrative 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 ActivityInsight instrument 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 already 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 ActivityInsight. Electronic data that can be converted to a CSV file, with column names matching the names of the appropriate ActivityInsight 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 ActivityInsight username. Submit the file through a Data Import Work Request to DigitalMeasures. For more information on Submitting a Data Import Work Request, see page 114.

**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 ActivityInsight. If you want data to be imported into ActivityInsight more frequently, please consider using Web Services. DigitalMeasures supports interoperability and automation with your existing systems via Web Services. Through Web Services, you can:

- view your ActivityInsight instrument configuration;
Setting Up Activity Insight

- import and export data;
- create and manage user accounts;
- assign and manage security roles.

For more information, see “Web Services” on page 137.
Step 7: Announce the System to Your Faculty

If desired, DigitalMeasures can send an email message to everyone with a user account in your ActivityInsight instrument to give them everything they need to access ActivityInsight, including information regarding login credentials and instructions. To send this email, DigitalMeasures 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 DigitalMeasures send this launch message, submit a General Work Request from within ActivityInsight. In the request, specify the following:

- Subject line of the message
- Contents for the message body
- Date and time to send the message

For more information on submitting a General Work Request, see page 123.
Managing Security Roles

Overview of Security Roles
Security Role Permissions
Default Security Roles
The University Administrator Security Role
Reviewing Your 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 are made up of permissions. Security roles can be assigned at the university, college, department and individual faculty member levels. Activity Insight Administrators can change the security roles for any user for whom they have permission. For more information on Changing a User’s Security Roles, see page 71.

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 you describe the changes to permissions. For more information on submitting a General Work Request, see page 123.

Assigning Security Roles to User Accounts

For more information on Changing a User’s Security Roles, see page 71.
Managing Security Roles

Security Role Permissions

The available security role permissions, each corresponding with a utility, are outlined below, along with brief descriptions 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**: Manage the seven steps in the setup process.
- **Dashboard**: View an overview of key aspects of ActivityInsight.
- **Manage Data**: Enter or manage other users' teaching, research and service activities.
- **Manage Administrative Data**: Easily copy all users' (for whom you have permission) Yearly Data records from one year to the next, or update users Yearly Data records from a central location.
- **Run Ad Hoc Reports**: Query the data in ActivityInsight using the parameters you identify.
- **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 on Running Custom Reports, see page 109.
- **Usage Statistics**: View statistics on the use of ActivityInsight by your users.
- **Users and Security**: Edit user account information, or create, delete or disable user accounts.
- **Work Requests**: Submit requests to modify ActivityInsight, view the status of open requests, view completed requests and receive feedback and helpdesk inquiries from users. The Work Requests permission can only be provisioned to one account at the university level and one account per college. By default, the Work Requests permission is provisioned to the University Administrator and College Administrator security roles.
- **Resource Center**: Connect with other DigitalMeasures 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 roles. For more information on Creating and Changing Security Roles, see page 54.

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 university or college levels.

Note: The security roles below are in descending order, grouped by scope, and then sorted by permissions. They are not the same order in which they appear in the Users and Security utility.

Table 1: Default security roles and their respective permissions (from least to most restrictive)

<table>
<thead>
<tr>
<th>Security Role</th>
<th>Setup</th>
<th>Dashboard</th>
<th>Manage Data</th>
<th>Manage Administrative Data</th>
<th>Run Ad Hoc Reports</th>
<th>Run Custom Reports</th>
<th>Usage Statistics</th>
<th>Users and Security</th>
<th>Work Requests</th>
<th>Resource Center</th>
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Assigning the Activity Insight Administrator Roles

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

- **University/College Administrator**: Full access to the system for all users (can be restricted by college or department roles that are more restrictive). Can submit Work Requests. Only one user account can be assigned to the University/College Administrator security role, as this security role has the Work Requests permission, which can only be provisioned to one user account at the university level.

- **University/College Limited Administrator**: Has the same permissions as the University/College Administrator, except the Work Requests permission. No restriction on the number of user accounts that can be added to this security role.
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 university. For example, First Name: Your University, 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 our other clients. This user account first and last name will be visible to other Digital Measures clients in the Resource Center.
Managing Security Roles

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 ActivityInsight, 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.

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. The list of permissions for that particular security role appears.

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” on page 54.

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 ActivityInsight, 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.
Managing Security Roles

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**.

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

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

   The Edit User page opens.

   See page 71 for more information on changing a user account’s security roles.

**Downloading the Security Role Configuration Report**

- **To download the Configuration Report of all of your instrument’s 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**.

   Above the list of security roles, click **Download Security Role Configuration Report** to download an Excel® spreadsheet detailing each role and its permissions.
### Security Role Configurations Report for Activities Database

<table>
<thead>
<tr>
<th>Security Role</th>
<th>Set Up</th>
<th>Dashboard</th>
<th>Manage Administrative Data</th>
<th>Manage Data</th>
<th>Run Ad Hoc Reports</th>
<th>Run Custom Repo</th>
</tr>
</thead>
<tbody>
<tr>
<td>University</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>University/Administrator</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

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

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

A sample Security Role Configurations Report in Excel®
Managing User Accounts

Overview of User Accounts
Creating User Accounts
Searching for User Accounts
Changing and Updating Existing User Accounts
Disabling and Deleting User Accounts
Managing Multiple User Accounts
Overview of User Accounts

Before your users can start inputting information about their activities, they need ActivityInsight user accounts. Without an account, a person cannot access ActivityInsight. Nor can his or her activity data be tracked, since ActivityInsight attaches activities to user accounts. Individuals who may require ActivityInsight 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 ActivityInsight administrator at any level.

Manually entering each user into ActivityInsight, one after another, is tedious and error-prone when you need to create accounts for many users at once. We recommend using a more efficient method, either by supplying your users’ information in a User Setup Template or by connecting your existing systems to ActivityInsight using Web Services. For more information on the User Setup Template, see page 76. For more information on Web Services, see page 137.

All Accounts Must Have an Email Address

ActivityInsight 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, we recommend entering a unique, fictitious email address for that user.

Usernames

Usernames are used for authentication and/or for importing data. DigitalMeasures uses the first part of users’ email addresses for the ActivityInsight username unless you specify something else. For example, if an account has an email address of stacyp@yourcampus.edu, we will create the username stacyp for the account.

You may want to assign a different username. For example, if you use LDAP Authentication the username in ActivityInsight 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 ActivityInsight are that they
- must be unique;
- cannot contain the “@” character;
- cannot be longer than 50 characters;
- cannot contain non-Latin characters.

Additional Unique Identifiers

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 your 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 ActivityInsight (e.g., EMPLID or UID). 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.

Bulk Loading User Accounts

ActivityInsight 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 ActivityInsight at one time.

For more information, see “Managing Multiple User Accounts” on page 76.
Creating User Accounts

Although we encourage all administrators to use the User Setup Template to create all your user accounts in bulk (see page 76), 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 25 new users, we suggest that you use the User Setup Template and create a Work Request. (See page 76.)

Creating a New User Account

› To create a new user account:

1. In ActivityInsight, 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.

4. Select the user’s authentication method.
Managing User Accounts

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.

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

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, a student worker who is assisting with data entry).

6 Select the user’s College(s) and Department(s) from the lists (if applicable).

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 your **Activity** insight instrument. (See page 123.)

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

7 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” on page 71.

| Important: | Making changes to users’ security at the college and department level will not affect their college and department assignments. |

8 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.

<table>
<thead>
<tr>
<th>Edit</th>
<th>Last Name</th>
<th>First Name</th>
<th>Username</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>McAuley</td>
<td>Paul</td>
<td>pmcauley</td>
</tr>
<tr>
<td></td>
<td>Peterson</td>
<td>Snelling</td>
<td>swellingspeteron</td>
</tr>
</tbody>
</table>

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

3. Select Enable User.

The user account is now enabled and listed in black in the list on the Users and Security page.

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

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 wildcards 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.
Managing User Accounts

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 page 27.

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.
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 (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 most current Yearly Data record.

Changing a User’s Authentication Method

If you have implemented an 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
Managing User Accounts

into ActivityInsight, he or she will have to use the newly selected method to log in. See Advanced Authentication on page 129 for more information about advanced authentication methods.

**Warning:** You can change the authentication method for ActivityInsight for any particular 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 ActivityInsight. 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 ActivityInsight, 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 ActivityInsight’s default Local Authentication, you can have ActivityInsight send a password reminder to the email address associated with the account.
Managing User Accounts

Note: ActivityInsight cannot send the password to users whose authentication method is either 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 ActivityInsight, 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.
3. In the Edit User page, select Request Password.
   
   AI 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 DigitalMeasures. 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 that he or she could update other users’ activity entries, but could not change the security roles for a user in another college. The University Administrator can add or remove roles from any user.

If no current role will grant the right permissions, you can request that a new security role be created. For more information, see “Creating and Changing Security Roles” on page 59.

To add or remove a security role from a user:

1. In ActivityInsight, 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.

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

4 Add or remove the security roles and/or role groups from this user account:
   a) Add a security role by selecting the role’s checkbox. If the checkbox is dimmed and unavailable, you will have to submit a General Work Request to add the user to that security role. See page 123 for more information.
   b) Remove a security role from a user account by selecting the checkbox to clear it.
   c) 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.
5 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.

<table>
<thead>
<tr>
<th>College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Data</td>
</tr>
<tr>
<td>Run Ad Hoc Reports</td>
</tr>
<tr>
<td>Run Custom Reports</td>
</tr>
<tr>
<td>Reports:</td>
</tr>
<tr>
<td>- Academic Degrees Earned</td>
</tr>
<tr>
<td>- Awards and Honors</td>
</tr>
<tr>
<td>- Birthday Report by Month</td>
</tr>
<tr>
<td>- Contact, Course, and Program Research by Faculty</td>
</tr>
</tbody>
</table>

*Details of the College security role*

6 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.
Managing User Accounts

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.
3. Select Disable User.

The user account is now disabled and dimmed in the list on the Users and Security page.

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

Deleting a User Account

Warning: Deleting an account 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.
Managing User Accounts

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. This will give you a backup of the user activity data that you can use, if necessary, to restore the data in Activity Insight. This can be done, if needed, by submitting a General Work Request. (See page 112.)

To delete a user account:

1. Export the user’s data by running an ad hoc report. See page 104 for details.
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.
4. Select Delete User at the top of the page and then select OK to confirm that you want to permanently delete this account. AI will remove the user account and all of its associated data from your Activity Insight instrument.

Deleted user accounts cannot be restored.

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 page 123). Please note that users that have submitted Work Requests cannot be deleted.
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 CSV file containing the information for the user accounts you want to add and submit it to DigitalMeasures as a Work Request. DigitalMeasures will create the user accounts.

The file must be in the CSV format. For help on creating this format, see 121.

User Setup Template

DigitalMeasures has made it simple to add multiple users at one time using the User Setup Template (UST). The UST is an Excel® spreadsheet that DigitalMeasures created to simplify importing your existing user account information into ActivityInsight, as this provides a structure for including the information necessary to create user accounts. You upload the completed spreadsheet and we create user accounts from it. This method of creating accounts is most effective and time saving when more than twenty five users need to be created. For less than twenty-five users, we recommend creating each user manually. The UST 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 UST 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

Collect the information from your existing databases, put it into the UST, and submit the completed file to DigitalMeasures through ActivityInsight using the Click here to submit the completed template link in Setup step 1, or as a User Creation Work Request. For more information on submitting User Creation Work Requests, see page 123.

By default, all user accounts created using the UST are assigned to the Faculty security role. To provision additional security for a user account, see “Assigning Security Roles” on page 54. Additionally, all user accounts created using the UST will be set up to have their activity data stored and tracked in ActivityInsight. For this reason, we recommend that you create your administrative accounts on a one-off basis.
Managing User Accounts

Note: Digital Measures will compare the college and department values that you provide in the UST 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.
   If you have already completed this step of the setup process, submit a User Creation Work Request.

2. 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 Excel®.

3. Open the spreadsheet and input your data. You will probably want to import data from one of your existing systems.

   The User Setup Template in Excel®

Note: If you are not using email addresses as the basis of your Activity Insight usernames, please add a “username” column to specify them.

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

   Digital Measures will process the request. You will be notified by Activity Insight when the work is complete.
Managing User Accounts

Note: Your first UST should be submitted using the Click here to submit the completed template link under Step 1 of the Setup utility.

Importing Additional User Data

Importing data that are not necessary to create user accounts is a process separate from creating user accounts. Data that are not required to create or uniquely identify user accounts should be submitted as Data Import Work Requests or via Web Services. For more information on Submitting a Data Import Work Request, see page 114. For more information on Web Services, see page 137.

Downloading User Account Information for All Users

ActivityInsight can generate a Microsoft Excel® spreadsheet that contains information about all of the users. The file contains the following information about your users:
- First, middle and last names
- Email address
- ActivityInsight username
- Default password for this user
- Whether the user is currently active 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 ActivityInsight, select Users and Security in the Left-Hand Menu.
2. Above the list of user accounts, select Download All User Information (Including Default Passwords).
3. If prompted, open the file with Microsoft Excel®. You may also save the file locally on your computer.
## Managing User Accounts

**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.*

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Email</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>McAuley</td>
<td>Paul</td>
<td></td>
<td><a href="mailto:p.mcauley@uni.edu">p.mcauley@uni.edu</a></td>
<td></td>
</tr>
<tr>
<td>Richards</td>
<td>Naiobi</td>
<td>L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thomas</td>
<td>Jerry</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sample user information spreadsheet
Customizing Screens and Fields

Configuration Report
Continuous Data Entry
Screen Types
Field Types
Screen, Field and Data Settings
Customizing Screens and Fields

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 Activity Insight instrument. The current Configuration Report is an Excel® spreadsheet showing the structure of your Activity Insight instrument, putting 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 that each change you request is consistent with the current structure of your Activity Insight instrument.

The Configuration Report, showing the Scheduled Teaching worksheet

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.
   If prompted, either open the file with Excel® or save it to your hard disk for later viewing.
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 that 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.
Customizing Screens and Fields

Screen Types

There are two types of screens in which to enter data in ActivityInsight: 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 ActivityInsight: 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 on record dates, see “Dates” on page 90.

Fields can be added to and removed from 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 60 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.

ActivityInsight does not currently support the ability to add text to summary screens.
Customizing Screens and Fields

Field Types

The following table shows the available field types in ActivityInsight. Help Buttons, which opens 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

<table>
<thead>
<tr>
<th>Type</th>
<th>Data Stored / Purpose</th>
<th>Usage Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkboxes</td>
<td>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 and Drop-Down Lists” on page 90.</td>
<td>▪ Classifications</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Area(s) of expertise</td>
</tr>
<tr>
<td></td>
<td>□ Administration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Graduate Teaching</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Non-Credit Teaching</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Research</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Service</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Undergraduate and Graduate Teaching</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ Undergraduate Teaching</td>
<td></td>
</tr>
<tr>
<td>Checkbox, Single</td>
<td>Box that is selected or cleared to turn on or off a value. For more information, see “Checkboxes and Drop-Down Lists” on page 90.</td>
<td>▪ Confirm our record</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Display in directory</td>
</tr>
</tbody>
</table>
## Customizing Screens and Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Data Stored / Purpose</th>
<th>Usage Examples</th>
</tr>
</thead>
</table>
| Record Reference   | List of records entered by the user in another screen from which the user can select only one value. The values from only one field on the other screen can be displayed in a record reference drop-down list. Creates an association between two records. For more information, see “Error! Reference source not found.” on page Error! Bookmark not defined. | - Associate users’ intellectual contributions with presentations  
- Associate user-defined goals with objectives                                                                                      |
| 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” on page 90. | - Date of hire  
- Date of tenure  
- Date published                                                        |
## Customizing Screens and Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Data Stored / Purpose</th>
<th>Usage Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drop-down list</td>
<td></td>
<td>▪ Department&lt;br▪ Classification&lt;br▪ Position/rank&lt;br▪ Academic term&lt;br▪ Contribution type</td>
</tr>
<tr>
<td></td>
<td>List of predefined values from which users can select only one value.</td>
<td>▪ Associating multiple contributors with intellectual contribution records&lt;br▪ Associating multiple intellectual contributions with grant records</td>
</tr>
<tr>
<td></td>
<td>The drop-down list ensures data integrity and consistency, and limits input values to those designated by your campus.</td>
<td>▪ Associating multiple contributors with intellectual contribution records&lt;br▪ Associating multiple intellectual contributions with grant records</td>
</tr>
<tr>
<td></td>
<td>For more information, see “Checkboxes and Drop-Down Lists” on page 90.</td>
<td>▪ Associating multiple contributors with intellectual contribution records&lt;br▪ Associating multiple intellectual contributions with grant records</td>
</tr>
<tr>
<td>Dynamic Sub-Answer (DSA)</td>
<td>Enables user to create multiple records within a record.</td>
<td>▪ Associating multiple contributors with intellectual contribution records&lt;br▪ Associating multiple intellectual contributions with grant records</td>
</tr>
<tr>
<td></td>
<td>Enables users to associate one record with multiple sub-records</td>
<td>▪ Associating multiple contributors with intellectual contribution records&lt;br▪ Associating multiple intellectual contributions with grant records</td>
</tr>
<tr>
<td></td>
<td>For more information, see “Dynamic Sub-Answers (DSAs)” on page 92.</td>
<td>▪ Associating multiple contributors with intellectual contribution records&lt;br▪ Associating multiple intellectual contributions with grant records</td>
</tr>
</tbody>
</table>
# Customizing Screens and Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Data Stored / Purpose</th>
<th>Usage Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Numeric</td>
<td>Numerical values with validation rules: integers, decimals, percentages or currency.</td>
<td>- Credit hours</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Number of undergraduate students advised</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Teaching workload percentage</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Stores integers in a phone number format.</td>
<td>- Office phone</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Fax</td>
</tr>
<tr>
<td>Store file</td>
<td>Link to a file stored on your campus's file storage server.</td>
<td>- Photographs</td>
</tr>
<tr>
<td></td>
<td>Creates a central repository of teaching, research and service related files.</td>
<td>- Syllabi</td>
</tr>
<tr>
<td></td>
<td>File Storage must be enabled.</td>
<td>- Full-texts of intellectual contributions</td>
</tr>
<tr>
<td></td>
<td>For more information, see “File Storage” on page 139.</td>
<td>- Presentation files</td>
</tr>
</tbody>
</table>
## Customizing Screens and Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Data Stored / Purpose</th>
<th>Usage Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text area</td>
<td>Multiple lines of up to 20,000 characters.</td>
<td>• Brief biography</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Description of pedagogical innovations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Brief description of responsibilities</td>
</tr>
<tr>
<td>Text box</td>
<td>Single line of characters.</td>
<td>• Title of article</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Course name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sponsoring organization</td>
</tr>
<tr>
<td>Time</td>
<td>Stores integers in a time format.</td>
<td>• Course time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Office hours</td>
</tr>
</tbody>
</table>
# Customizing Screens and Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Data Stored / Purpose</th>
<th>Usage Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>User reference</td>
<td>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 on page 93.</td>
<td>Authors, Presenters, Instructors, Inventors</td>
</tr>
<tr>
<td>Yes/No</td>
<td>Drop-down list with yes and no values. Used to answer a yes/no field.</td>
<td>Tenure track, Graduate faculty, On leave</td>
</tr>
<tr>
<td>URL</td>
<td>Text box preceded with http://. Used to enter a web address.</td>
<td>Personal website, Publication reference, MS SharePoint® reference</td>
</tr>
</tbody>
</table>
Customizing Screens and Fields

**Checkboxes and Drop-Down Lists**

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

![Example of a scrolling checkbox field](image)

Deleting or renaming values of checkboxes and drop-down lists will affect existing records in **Activity Insight** that contain the value that is being deleted or renamed. When submitting Screen Revision 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.

**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](image)

**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 1st and an end date of December 31st 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 for the report. 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 or not 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 DSA, **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.

Date fields in dynamic sub-answers (DSAs) (see page 92) can be significant. However, date fields in DSAs do not automatically sort in chronological order. Dynamic sub-answer records appear in the order in which they are entered or manually ordered. For dates within DSAs, **Activity Insight** will scan all significant dates and use the minimum and maximum date values in the rows, regardless of the order in which they have been entered, as the start and end dates, respectively.
Customizing Screens and Fields

**Dynamic Sub-Answers (DSAs)**

A dynamic sub-answer (DSA) is a record within a record. An example of DSA usage in ActivityInsight 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](image)

**Significant Order**

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 that enable users to change the order of the DSA records.

![Significant ordering enabled for a DSA](image)

Dynamic sub-answer records cannot be automatically sorted. If the order of DSA records is relevant, you will want to enable significant ordering for the DSA. 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.

**Store File**

Files can be associated with records in ActivityInsight using File Storage (see page 139). By default, Store File fields are on the following screens in ActivityInsight:
Customizing Screens and Fields

- Personal and Contact Information
- Scheduled Teaching
- Artistic and Professional Performances and Exhibits
- Intellectual Contributions
- Presentations

If you do not plan to enable File Storage, you should consider submitting a Screen Revision(s) Work Request to have these fields deleted from your ActivityInsight instrument.

**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 ActivityInsight 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 can only be populated using users’ primary usernames, not secondary user identifiers.

**Important:** When data are imported from other systems, user reference fields cannot always be populated; they may be stored as text. This is because the user identifiers in the import data may not match the ActivityInsight usernames, which is required in order to populate a user reference field. 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 can be configured at the instrument level to be either non-editable (default) or editable.

**Non-Editable (Default)**
By default, only the user who created a record is able to edit that record.

**Editable**
User reference can also be configured so that all users associated with a record can edit the record.

**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.
Customizing Screens and Fields

Disabling User Reference

The linking feature of user reference fields can be disabled at the field level so that 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 Work Request that is submitted requesting that user reference be disabled.

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 the 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.

Collaborator Name Parsing

Collaborator Name Parsing is functionality that enables a user to paste a list of names 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.
Customizing Screens and Fields

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 a DSA with a user reference field, submit a Screen Revision(s) Work Request.

The collaborator name parsing screen
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 ActivityInsight.

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 3: Screen, Field and Data Access (from least to most restrictive)

<table>
<thead>
<tr>
<th>Type</th>
<th>Capability</th>
<th>Usage Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>None (Default)</td>
<td>Users with permission can view, add, edit and delete data.</td>
<td>• Intellectual contribution titles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Description of accomplishments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Teaching interests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Research interests</td>
</tr>
<tr>
<td>Read-Only</td>
<td>Users with permission can view and run reports on data.</td>
<td>• Date of hire</td>
</tr>
<tr>
<td></td>
<td>Users with Manage Data permission can also edit data.</td>
<td>• Date of tenure</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Scheduled teaching data</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Course evaluation data</td>
</tr>
<tr>
<td>Hidden</td>
<td>Users with Manage Data permission can view and edit data.</td>
<td>• Source of Imported Data fields</td>
</tr>
<tr>
<td></td>
<td>Users with Run Ad Hoc Reports permission can run ad hoc reports on hidden data.</td>
<td>• Confidential/sensitive data</td>
</tr>
<tr>
<td>Locked</td>
<td>Users with permission can view and run reports on data.</td>
<td>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 (e.g., Banner, Datatel, PeopleSoft, etc.). This ensures that any data updates are made to the original source of the data, not in ActivityInsight.</td>
</tr>
<tr>
<td></td>
<td>No one can edit/delete data.</td>
<td></td>
</tr>
</tbody>
</table>

Read-only, hidden and locked screens and fields are still visible to users with Manage Data access. For this reason, we advise deleting 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
Customizing Screens and Fields

place, users are able to add, edit 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 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, we advise against putting the override in place.

Descriptors

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

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 (specifically, dates) are not available when the record is created.

<table>
<thead>
<tr>
<th>Table 4: Screen and Field Descriptors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>Default</td>
</tr>
</tbody>
</table>
| 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 ActivityInsight. Data is automatically made data publicly available. It is just an indicator of what the campus intends to make publicly available outside of ActivityInsight. Denoted on the screen by a red letter P. | Data that may be displayed on a public website using Web Services |
# Customizing Screens and Fields

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Usage Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>Data must be entered in the field before a record can be saved.</td>
<td>▪ Title</td>
</tr>
<tr>
<td></td>
<td>Denoted on the screen by a red asterisk (*).</td>
<td>▪ Contribution type</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Current status</td>
</tr>
</tbody>
</table>

## 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, but not to provide different variations of screens and fields to different colleges. Restrictions can never result in multiple versions of the same question, as this would cause confusion to a user associated with both colleges as the data being collected is nearly identical, and it would also cause ambiguity in reporting. Colleges must be in complete agreement with regard to data that are collected university-wide. For example, one college could not have a restricted field named “Preferred Name,” while another college has a restricted field named “Nickname,” as this would cause confusion to a user associated with both colleges.
Customizing Reports

New Report Templates
Submitting Reports
New Report Templates

Once your campus becomes familiar with ActivityInsight and its reports, you will likely come up with new reports you would like built. To build new reports into ActivityInsight, you would need to create a Report Setup Work Request and include a sample of the report in Microsoft Word®, Microsoft 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 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 that your ActivityInsight instrument reflects the requirements of the reports your campus needs to create.

Each new report should be submitted as a separate Report Setup Work Request (see page 123). 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 ActivityInsight.

Creating a Sample Mock-Up Report

You will need to 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 ActivityInsight. Using an existing report that is already in ActivityInsight 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 ActivityInsight 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.

<table>
<thead>
<tr>
<th>Contracts, Grants and Sponsored Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Organization</td>
</tr>
<tr>
<td>Report Start Date - Report End Date</td>
</tr>
</tbody>
</table>

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 DigitalMeasures for each report you need built. The reports you submit should be in Microsoft Word®, Microsoft 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 (e.g., 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.

- **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 (e.g., Faculty Activity Report, Annual Activity Report, or Faculty Annual Activity Report). Capitalization and punctuation are important.

For detailed instructions on Submitting Report Setup Work Requests, see page 123.
Running Reports On Your Data

Overview of Reporting
Running Ad Hoc Reports
Running Custom Reports
Overview of Reporting

ActivityInsight provides powerful reporting that is customizable to fit your campus’s exact needs. The campus ActivityInsight administrators – at the university, college and department levels – can generate reports on the activities of the users for whom they have access. Individual users can generate reports on their own data. With ActivityInsight, 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.

ActivityInsight 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 ActivityInsight. If certain fields or screens do not contain any data, a report run for those fields or screens will not return any data.

Ad Hoc Reports

If the existing report templates of Run Custom Reports do not meet your reporting needs, Run Ad Hoc Reports lets you run a single-instance report. You pick what to include in the report: which data, which users and which dates. ActivityInsight creates a report customized to your requirements.

Custom Reports

Run Custom Reports provides reports based on established templates, including custom templates created for your campus. You choose one of the several report templates, pick the appropriate date range and users to report on, and ActivityInsight produces your report in a standardized format.

ActivityInsight comes with a number of reports that can be run immediately. All of ActivityInsight’s report templates can be modified in any way to meet your campus’s needs. DigitalMeasures eliminates the drudgery of creating reports by digitizing the process, using the specific data elements, calculations and formatting you specify.
Running Reports On Your Data

Running Ad Hoc Reports

Sometimes, the report templates in Run Custom Reports do not completely meet your needs. The Run Ad Hoc Reports page enables you to create single-instance reports from your campus’s data, whether campus-wide or on particular colleges/schools, departments, individuals or groups.

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

If you find yourself repeatedly running the same ad hoc report, consider submitting a Report Setup Work Request to DigitalMeasures to create a new report template based on it. (See page 123.)

Running an Ad Hoc Report

To run an Ad Hoc Report:

1. In ActivityInsight, 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 ActivityInsight 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.
Running Reports On Your Data

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, then select the item. Select the minus sign to hide the list again.

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

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

5 Select an option for organizing the data in your report.
Running Reports On Your Data

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 that you have selected.

By default, all enabled users are included in your report. To limit your report to certain users or groups, select Click here in step 5 to open the Select Who To Include pop-up window.

You can select to include particular 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.

ActivityInsight uses the user attributes (e.g., college, department, etc.) in users’ most recent Administrative Data - Yearly Data records (including records in the future) to determine who should be included.

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 that 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.

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

The Run Ad Hoc Reports page will show the individuals you selected to include in your report under step 5.
7 Select the file format for your report from the drop-down list in step 6. **DigitalMeasures** supports several file formats, including Microsoft Word®, 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, but will not be very human-readable. The default format is Microsoft Word®.

8 Select the paper size and orientation for your report from the drop-down list in step 7. **DigitalMeasures** supports several formats, including US Letter and A4 sizes, and portrait and landscape orientations.

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

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

10 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**.

11 In the lower sections, choose the report options. The content of these options is based on your prior choices.
12 Review your selections and select **Build Report**.

**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.
Running Custom Reports

Run Custom Reports is a template-based reporting utility. Here you will find base reports that come with ActivityInsight, as well as custom reports that you submitted.

The following base reports are available immediately in ActivityInsight:

- 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

Running a Custom Report

To run a custom report:

1. In ActivityInsight, 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**.

   ![Sample Creative Works report template](image-url)
3. Select the date range for the information you wish to include in your report. 

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

4. *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 in as “and” options, and the report will include all selections made.

*Activity*Insight uses the user attributes (e.g., 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](image)

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

a) Select the headings to show or hide the groups and then select the ones that 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.

Further, you can select to include enabled, disabled or both enabled and disabled users in your report.
running reports on your data

the create a report page will show the individuals you selected to include in your report under step 5.

5 select the file format for your report from the drop-down list in step 4. 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.

6 select the paper size from the drop-down list in step 5. activity insight supports us letter and a4 sizes.

7 review your selections and select build report. 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 manage data to make these changes.
Managing Work Requests

Overview of Work Requests
Submitting a Data Import Work Request
Submitting Report Setup Work Requests
Submitting Report Revision(s) Work Requests
Submitting All Other Types of Work Requests
Tracking 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;
- modify security roles.

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 sure 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?** This is typically one or more security roles. Additionally, a report 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. The types of data entry fields are detailed on page 80.
- **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.

By clearly answering these questions in your Work Request, and giving as much detail as possible, you will increase the likelihood that Digital Measures will be able to 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 (see page 119) and uploading it to DigitalMeasures through the Work Requests utility. Only one data import file can be submitted per Work Request.

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

Data Import Request

Please select a comma-separated value (CSV) file from your computer that you would like to load into the system and then click **Open**.

The file must meet these two requirements in order for it to be loaded into the system:

1. The first row in the file must contain the first option or code of the field for which the data in each column are to be loaded (e.g., "Scheduled Teaching: Course ID" or "SOMETHING COURSEID").

2. There must be one column in the file that contains a unique identifier that allows each row in the file to be linked to exactly one user account in the system (e.g., an ID number, email address, etc.).

If your data are not in a comma, you may select "File > Save As..." in Microsoft Excel to save a file as a CSV (Comma-Separated) file.

File upload box in the Data Import page

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

Windows file upload dialog

5. 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**.
6 When step 2 appears, select the column name that contains the file’s unique user IDs and select Check Users.

**ActivityInsight** compares the contents of the column you selected to the existing user account information in your ActivityInsight instrument.

7 Each person in the file on whose behalf data will be imported must have an ActivityInsight 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 ActivityInsight instrument.

a) If any of the user IDs fails to match with an ActivityInsight account for your campus, or the user is not setup to have activity tracked, ActivityInsight will display an error message and stop the file upload process.
Managing Work Requests

To continue, select Cancel Request and then either create a user account for this user using the instructions noted on page 65, or delete the row from your CSV file and upload the revised file.

8 When Step 3 appears, select “Create new records,” “Update existing records,” or “Create new records and update existing records.”

3 a) If you choose “Update existing records” or “Create new records and update existing records,” you will need to define the primary keys.

b) If a screen with a defined primary key was selected, you will not have the create option or the ability to define a primary key.
9 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 export to a CSV file. If the data in your CSV file includes leading zeroes, include instructions in Step 4 that state the columns in your CSV file that have an absolute number of digits and the absolute number of digits each value should have. For more information, see Leading Zeroes in CSV Files on page 121.

10 A new Data Import Work Request is created and added to the Your Open Work Requests list.
Managing Work Requests

Once submitted, your Data Import Work Request is added to the DigitalMeasures work queue. You will be notified when the data file has been imported into ActivityInsight.

Working With Comma-Delimited Files

DigitalMeasures 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 an 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 identifier in ActivityInsight for the user account associated with the data in each row. This unique identifier could be

- an ActivityInsight username;
- a campus ID number;
- an employee ID number;
- an email address;
- a campus username (if used as ActivityInsight username).

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

First Row: Labels of the Input Field
Each column must contain a different piece of information, corresponding to a single input field in ActivityInsight. 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

![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 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. We recommend that you keep each record on one row, and repeat any fields that need to hold more than one record as multiple columns.

In the example above, taken from the Intellectual Contributions screen, the author fields included in the DSA are repeated in order to include all authors.

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.
Managing Work Requests

Course Prefix drop-down list, showing abbreviations

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<table>
<thead>
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</thead>
<tbody>
<tr>
<td>1</td>
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<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>ID</td>
<td>Term</td>
<td>Year</td>
<td>Course Name</td>
<td>Course Prefix</td>
<td>Course Number</td>
<td>Section Number</td>
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<td>7</td>
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<tr>
<td>epcahs</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Accounting</td>
<td>ACCT</td>
<td>101</td>
<td>907</td>
</tr>
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<td>3</td>
<td>4</td>
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<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>richards</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Finance</td>
<td>FINC</td>
<td>101</td>
<td>902</td>
</tr>
<tr>
<td>4</td>
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<tr>
<td>richards</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Management</td>
<td>MGMT</td>
<td>101</td>
<td>905</td>
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</tr>
<tr>
<td>roberts</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Marketing</td>
<td>MKTG</td>
<td>101</td>
<td>910</td>
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<td>6</td>
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<tr>
<td>scemmer</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Operations Management</td>
<td>OPRS</td>
<td>101</td>
<td>922</td>
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<td>13</td>
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<tr>
<td>thomas</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Statistics</td>
<td>STAT</td>
<td>101</td>
<td>904</td>
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<tr>
<td>8</td>
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<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>reynolds</td>
<td>fall</td>
<td>2007</td>
<td>Intro to Communications</td>
<td>COMM</td>
<td>101</td>
<td>913</td>
</tr>
</tbody>
</table>

Note: You can download a spreadsheet containing the current configuration of your Activity Insight instrument, including the contents of the drop-down lists, from the Dashboard page. See page 95.

Leading Zeroes in CSV Files

If there are leading zeroes in your data, they will be stripped when you export to a CSV file. For example, if your course numbers must be six digits (e.g., “000101”) the leading zeroes will be stripped from the CSV file (e.g., “101”).

When uploading your data import file, include instructions in Step 4 that state the columns in your CSV file that have an absolute number of digits and the absolute number of digits each value should have.

Handling Commas as Part of a Field Value

When commas are contained within the data, but the space in which they appear is not enclosed in quotes, these commas are seen as field delimiters. This results in data that is not correctly tied to the appropriate column header, and thus will not be loaded into the correct question on the screen.

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

You can use 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 in 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.
Managing Work Requests

- To save an 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)](Image)

3. Choose a location to save the file, change the filename (if desired) and select **Save**.

   If your workbook contains more than one worksheet, Excel® will prompt you to confirm that it is saving the active worksheet only.

   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 DigitalMeasures for each report. The reports you submit should be in Microsoft Word®, Microsoft Excel®, or rich-text format. Each report should be accompanied by additional information.

- **To add a new custom report:**
  1. In ActivityInsight, select Work Requests in the Left-Hand Menu.
  2. Select Report Setup in the drop-down list and select Continue.

  ![Select Report Setup](image)

  Please select the type of request you would like to submit.

  ![Submit Request](image)

  3. In step 1, describe the report template that you want created.
     
     Make sure that you include:

     - **Who will run this report?** This is typically one or more security roles for one or more units; e.g., the College Limited Administrator security role for the College of Education, or Faculty security role for the entire campus.

       ![Note](image)

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

     - **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.

       See “What Should Be In a Work Request” on page 113 for more information.

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

     If a sample report does not exist, you will need to create a mock-up report (see page 100).

  5. Select Submit Request.

     DigitalMeasures will process the Work Request and create a new report template based on your mock-up. You will be notified by DigitalMeasures when your report has been added.
Submitting Report Revision(s) Work Requests

Submit a separate, Report Setup Work Request to DigitalMeasures for each report you need revised. The reports you submit should be in Microsoft Word®, Microsoft Excel®, or rich-text format. Each report should be accompanied by additional information.

- **To modify an existing custom report:**
  1. In ActivityInsight, 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. Make sure that you include:
     - **Any changes to who will run this report.** This is typically one or more security roles for one or more units; e.g., 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.
     - **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. E.g., Faculty Activity Report, Annual Activity Report, or Faculty Annual Activity Report.
       
       See “What Should Be In a Work Request” on page 113 for more information.
  4. In Step 2, select Browse, choose the mock-up report that reflects the modifications you would like made (see page 100).

  **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.

  5. Select Submit Request.
Managing Work Requests

DigitalMeasures will process the Work Request and modify the report template based on your mock-up. You will be notified by DigitalMeasures when the revisions to your report are complete.
Submitting All Other Types of Work Requests

To submit a new Work Request:

1. In ActivityInsight, 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 ActivityInsight 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.
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 upload the file to the server.
7. Select Submit Request.

DigitalMeasures will process the Work Request and you will be notified by DigitalMeasures when it has been completed.
Managing 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.

- **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.
**Additional Features**

- Advanced Authentication
- Beta Environment
- Data Backups
- File Storage
- Web Services
Advanced Authentication

The login (or authentication) process is important. It is important to ensure that your ActivityInsight data are secure and that it is easy as possible for your users to access ActivityInsight. Further, the more seamless authentication is for your users, the less likely they are to forget passwords or write them on notes in their offices. Advanced Authentication enables your users to use the same username and password they use for other purposes, such as signing into a portal or accessing their email.

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

ActivityInsight also supports three methods of Advanced Authentication.

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

**Warning:** Users’ ActivityInsight 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. We recommend that the ActivityInsight University Administrator use Local Authentication so that he or she can always access ActivityInsight, even if your Shibboleth Identity Provider (IdP), portal or LDAP servers are down.

**Note:** You can change the authentication method for ActivityInsight 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 ActivityInsight. 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
Additional Features

Local Authentication, users must use a username and password combination set unique within ActivityInsight.

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 ActivityInsight requires that users use the ActivityInsight login page.

Implementation Details
Because Local Authentication is the default for ActivityInsight, no other actions are necessary from you other than creating user accounts. DigitalMeasures 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 the system 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. DigitalMeasures supports Shibboleth® Authentication, allowing your users to access DigitalMeasures either directly or via a link, such as "Access DigitalMeasures" 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, then automatically logged in to DigitalMeasures behind-the-scenes.

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

DigitalMeasures is a Sponsored Partner of the InCommon Federation. If your campus is also a member of the InCommon Federation, implementation is straight forward.
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’ IdP. The Security Assertion Mark-Up Language (SAML) Response is only submitted once, during the initial redirection to Activity Insight. 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 that 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. Digital Measures only requires and consumes the `eduPersonPrincipalName` attribute; all other attributes will be ignored.

If your campus wishes to use an attribute other than `eduPersonPrincipalName`, 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 63.
Additional Features

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 DigitalMeasures’ Shibboleth® Service Provider (SP).

DigitalMeasures’ Shibboleth® SP EntityID is https://www.digitalmeasures.com/shibboleth-sp/. This URL also provides DigitalMeasures’ self-published Shibboleth® SP metadata, which will be required if you are not a member of the InCommon Federation.

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
- If you are not a member of the InCommon Federation, a URL for your campus’s Shibboleth® IdP metadata
- A single sign-off URL, if your campus has one (optional)

**Important:** Shibboleth® does not yet define a standard single sign-off protocol.

If you have a single sign-off URL that 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). DigitalMeasures will complete the necessary work to configure your ActivityInsight instrument. DigitalMeasures will provide the login URL configured to use your IdP and confirm the date on which the user accounts will be switched to Shibboleth Authentication.

**Important:** Users can no longer use the ActivityInsight local authentication login page after they have been switched to Shibboleth® Authentication.

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

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

The DigitalMeasures authentication URL accepts the encrypted token, then decrypts and verifies the following:

- The specified user has a DigitalMeasures 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 referer matches a list of known URLs (optional)

Figure 3 – Using Portal Authentication

Portal Authentication is a secure authentication method. Your users never have to provide their credentials to a DigitalMeasures server, only to the server managed by your campus. The token is encrypted using AES encryption, and contains the user’s ActivityInsight username and an expiration date. The token is only submitted once, during the initial redirection to ActivityInsight.
Additional Features

**Activity** insight can also verify the HTTP referer 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 that 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/tokenTest.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-Referer(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

**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 your **Activity** insight instrument. **Digital** Measures will provide the production URL and encryption key and 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, and 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 DigitalMeasures login page and make an authentication attempt. DigitalMeasures connects to your directory server, and attempts to authenticate against it with the authentication information provided by the user. The user is allowed into the system if the authentication attempt is successful and a DigitalMeasures account for the person exists.

LDAP Authentication lets your users use their campus credentials to access ActivityInsight. Unlike an integrated portal solution, users must log in using the ActivityInsight login page. However, they use their normal campus username and password, which ActivityInsight checks using a secure connection to your campus’s server.

Although user credentials are sent over a secure connection, they still must pass through DigitalMeasures’ 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 ActivityInsight may not have accounts in your campus system. Also, you may wish to leave some administrator accounts to use ActivityInsight’s default, Local Authentication, so that they may still access ActivityInsight 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 that it allows requests
- over port 636 (secure LDAP);
- from the IP addresses
  - 75.102.5.252;
  - 75.102.40.10.

Your campus will also need to create an account on that server for DigitalMeasures 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:
- SSL certificate
- URL of the LDAP server
- Account credentials for DigitalMeasures to access the campus server

Once you have received this information, submit a General Work Request with it and your list of excluded users. DigitalMeasures will complete the necessary work to configure your ActivityInsight instrument. DigitalMeasures will contact you when the change has been made and to confirm the date on which the user accounts will be switched to LDAP Authentication.
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 that your institution uses to log in to Activity insight. For example, 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 the Beta Environment.
Data Backups

DigitalMeasures takes significant steps to ensure your campus’s ActivityInsight data are safely stored. In our partnerships with Sun Microsystems and Iron Mountain, we make five backups of all client data every night. However, many clients desire to maintain local backups of their data, which we encourage. Local backups absolutely guarantee that you have a full copy of all of your data, 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 ActivityInsight data, submit a General Work Request to DigitalMeasures. DigitalMeasures will then provide you with the URL, username and password that you will need to access your Data Back-ups. Data Back-ups are run every weekend, and the data can be accessed as is until it is overwritten by the next week’s backup record.
File Storage

Your users keep track of their activities with ActivityInsight. As part of the data that are collected, you could be using the system to collect files from your users using File Storage. File Storage supplements the activities stored in ActivityInsight by including related files, such as:

- full-texts of intellectual contributions that your users have published;
- syllabi of courses;
- presentation files, such as PowerPoint documents, of presentations your users have given;
- users’ photographs.

The advantage to putting File Storage in place is that it makes supplemental documentation easily accessible by storing them in a central location. The files are uploaded through ActivityInsight but are stored locally at your campus. When requested, ActivityInsight makes a call to your campus file server to request the files. The files appear to be stored in ActivityInsight when, in fact, all that is stored in ActivityInsight are links to the files. Figure 5 illustrates how File Storage works.

An alternative to storing files on your campus is to store the files with Amazon. For more information, see “Amazon Simple Storage Service®: An Alternative to a File Storage Server” on page 142.
Additional Features

Requirements

File Storage requires that your campus configure its firewall so that it allows requests

- via port 443;
- from the IP addresses
  - 75.102.5.252;
  - 75.102.40.10;
- to a server that
  - runs WebDAV over SSL. 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 File Storage;
  - accepts logins using Basic Authentication;
  - has sufficient storage capacity on this server to handle all the files that your users upload.

Your campus will also need to create an account on that server that has full read/write access to the account’s root directory for ActivityInsight to use.

Warning: The files stored using File Storage are accessed through ActivityInsight but stored locally on your campus servers and managed by your campus’s technical staff. These files should be back up regularly by your campus. Also, files that are stored by ActivityInsight should be managed exclusively through ActivityInsight.

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.

- SSL certificate
- IP address
- Username and password for the account the ActivityInsight server is to use

Once you have received this information and are ready to implement File Storage, submit a General Work Request with the above information to DigitalMeasures.

Server Certificates

As a security measure, we require a SSL certificate to put WebDAV in place to ensure that we are connecting to the server to which we think we are
connecting. Our application has a repository of trusted certificates and we will not connect to a server unless that certificate is in our list of trusted servers. The file should be a CER file that is base-64 encoded in x.509 PEM format. However, DigitalMeasures can convert most files to the required format, if necessary.

Your campus’s server certificate can be self-signed.

**Server Space**

In determining the amount of server space your campus should allocate to File Storage, we advise considering a number of factors:

- The number of users that will be storing files to the server
- The types of files that will be stored (audio, video, and image files may require more storage space)
- 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, we recommend reevaluating your file storage needs and adjusting 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.

**File Type and Size**

DigitalMeasures does not place any restrictions on the types of files that can be stored using File Storage.

The maximum number of files that can be uploaded by a user in a single instance is 25.

The default maximum file size is 10MB. However, the maximum file size can be increased.

**Note:** Additional limitations may exist based on your campus’s server configuration.

**Reports**

Custom reports in ActivityInsight can include links to the files stored using File Storage. However, in order for people to be able to access the documents stored on your File Storage server using those links, your campus will need to:

1) create user accounts on that server for those who need to access the files; or
2) ensure the server has public, read-only access.
Amazon Simple Storage Service®: An Alternative to a File Storage Server

If you are interested in implementing File Storage, but do not have a server available on your campus, DigitalMeasures supports connecting instead to storage space purchased by your institution through Amazon Simple Storage Service (Amazon S3). To purchase storage space from Amazon, visit http://aws.amazon.com/s3.

DigitalMeasures does not provide, is not responsible for, and makes no assurances regarding the products or services offered by Amazon®. DigitalMeasures’ privacy policies do not apply to Amazon®. You should review Amazon’s applicable agreements to ensure compliance with your institution’s policies.

Requirements
File Storage using Amazon S3 requires that your institution purchase storage space from Amazon. To purchase storage space from Amazon, visit http://aws.amazon.com/s3.

Implementation Details
When you are ready to implement File Storage, submit a General Work Request to implement File Storage with the following details to DigitalMeasures:

- Amazon S3® Access Key ID
- Amazon S3® Secret Access Key

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.
   a) If you wish to generate a new Access Key ID, select Create a New access key.
4. For the Access Key ID that you will use with our system, in the same section, under the heading Secret Access Key, select Show.
Web Services

An optional part of your ActivityInsight setup enables you to pull data directly from, and push data to, ActivityInsight in real-time.

DigitalMeasures 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 ActivityInsight 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 data and changing permissions assigned to security roles.

Integrating ActivityInsight 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.
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 ActivityInsight on a scheduled basis using Web Services.

Consider loading the following from your existing systems:

- Basic employee data (e.g., 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 on the Web Services platform, download the Web Services documentation from your Dashboard (see page 24).
Reference

Glossary

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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.

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.

Record Reference Creates an association between two records. List of records entered by the user in another screen from which the user can select only one value. The values from only one field on the other screen can be displayed in a record reference drop-down list.

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.

**firewall**  
A part of a computer system or network that is designed to block unauthorized access while permitting authorized communications.

**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.

**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.

**LDAP Authentication**  

**numeric field**  
Field type of numerical values with validation rules: integers, decimals, percentages or currency.

**File Storage**  
Enables users to supplement the activities stored in ActivityInsight by uploading files through ActivityInsight but storing the files locally at your campus.
<table>
<thead>
<tr>
<th><strong>parameter</strong></th>
<th>A variable that can be given a specific value when a report is generated.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>password</strong></td>
<td>A confidential sequence of characters that a user must input to gain access to a file, application, or computer system.</td>
</tr>
<tr>
<td><strong>PasteBoard</strong></td>
<td>Enables users to easily copy up to 4K worth of text from another document and drag and drop the text into a field in the system. Available only from the expandable tray on the Manage Your Activities page.</td>
</tr>
<tr>
<td><strong>permission</strong></td>
<td>The ability to access a utility.</td>
</tr>
<tr>
<td><strong>primary key</strong></td>
<td>One or more fields on a table used to uniquely identify each row in a table.</td>
</tr>
<tr>
<td><strong>R</strong></td>
<td>Provides a way to quickly and easily run custom reports on the data in the system from the same pages into which you enter data. Available only from the expandable tray on the Manage Your Activities page.</td>
</tr>
<tr>
<td><strong>S</strong></td>
<td>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 university, college, department and individual levels.</td>
</tr>
<tr>
<td><strong>significant date</strong></td>
<td>Date fields used to determine if a record will be included on a report.</td>
</tr>
<tr>
<td><strong>significant ordering</strong></td>
<td>Functionality that can be enabled within a dynamic sub-answer (DSA) that enables users to change the order of DSA records.</td>
</tr>
<tr>
<td><strong>static screen</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>store file</strong></td>
<td>A link field type that enables users to upload a file to your campus’s file storage server. Creates a central repository of teaching, research and service related files. File Storage must be enabled.</td>
</tr>
</tbody>
</table>
| **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 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. Secondary to a username. Used only 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 (UST)**  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 the system.

**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 implement File Storage.

**Work Requests**

The formal method for initiating work to be completed on your behalf by DigitalMeasures. 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.
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