



ACTIVITY INSIGHT – BASIC NAVIGATION AND FUNCTION

Version: January 2017

The purpose of this document is to provide instructions on basic functions of the Activity Insight system.

Accessing Activity Insight:

1. Most internet browsers are supported. You may find it slightly easier to enter data using Firefox, which supports the “type ahead” feature.
2. Go to www.ilr.cornell.edu/facultyreporting
3. Click on LOGIN
4. Activity Insight utilizes Shibboleth authentication. When you are brought to the login menu, type in your NetID and password (the same one used for your Cornell email), and you will be taken to the Activity Insight home screen.

Main Menu:

When you enter Activity Insight, you will see the following screen:

Welcome, Theresa Woodhouse! Log Out

You are currently managing data for Kevin Hallock.
[Review a guide](#) to manage your activities. [Show more](#)

- Dashboard
- Manage Activities
- Manage Data**
 - Rapid Reports
 - PasteBoard
- Run Reports
- Usage Statistics
- Users and Security
- Work Requests
- Resource Center
- Help

General Information

- Personal and Contact Information
- Education
- Administrative Data - Rank & Title Data | Academic Year Data
- Professional Development Activities
- Government and Military Positions
- Licensures and Certifications
- Academic and Professional Positions
- Memberships
- Administrative Assignments/Appointments
- Faculty Narratives and Interests
- Awards and Honors

Intellectual Contributions

- Editor, Reviewer and Chair Activities
- Presentations
- Publications
- Media Contributions

Teaching

- Courses Taught
- Assessment of Student Learning (Resident Faculty)
- College Course Evaluation Averages
- Directed Student Research and Independent Study
- Non-credit Instruction
- Academic Advising

Research

- Contracts, Grants, and Sponsored Research (Read Only)
- Research Currently in Progress
- Contracts, Grants, and Sponsored Research (Faculty Entry)
- Biographical Sketch - NIH | NSF

Extension/Outreach

- Extension & Outreach Statement
- College Sponsored Consulting and Technical Assistance

Service

- Department
- Professional/Academic Service
- College/School
- Public
- University

Impact Statements

- Impact Statement

Cornell University
 POWERED BY DigitalResources
 Privacy Policy

On the left hand side of the screen are the **navigation options**. The following navigational links are presented: (You do not have access to Usage Statistics/Users and Security/Work Requests/Resource Center):

- 1) **Manage Activities** – This link will take you to the Activities Database – University menu where you will see all the screens where data can be entered and is the default location when you log in. Click on the name of the screen for which you wish to add or modify data.
- 2) **Run Reports** – This link allows you to obtain reports that use specialized formatting and other custom data manipulations. The annual reports for the Dean are among those available here.
- 3) **Help** – sends note to Digital Measures. Digital Measures will likely forward your inquiry to the University or College Administrator for response, so it is recommended that you contact the [System Administrator](#) directly first; they will contact Digital Measures if the issue needs to be escalated to the vendor for resolution.
- 4) **Privacy Policy** – information about Digital Measures’ ability to keep faculty data secure and confidential is available in the bottom left of the screen.
- 5) **Log Out** – Located next to your sign-in name. Be sure to click here when leaving the system so you do not get “hung up” and unable to log back in later.

Once you familiarize yourself with the **navigation options**, you can start the data entry process using Activity Insight.

Completing the Data Entry Process:

Faculty: On the **Main Menu**, click on **“Manage Activities.”** This will take you to the main database entry page, which is the default when logging in to the system.

Staff: On the **Main Menu**, click on **“Manage Data.”** You will then be asked to select a user from a drop-down list. Choose the appropriate faculty member and select **“Continue.”** This will take you to the main database entry page.

Please note that there is a Pasteboard available under the **“Manage Activities”** heading. The Pasteboard allows you to copy and paste data from another source into Activity Insight prior to pasting it into a specific field. This feature is useful if you wish, for instance, to copy an entire publication citation from a word file to the pasteboard, and then cut/paste each individual element to the appropriate fields in the publication screen without having to toggle between applications.

The major data collection categories used are: General Information, Intellectual Contributions, Teaching, Research, Extension/Outreach, and Service. Under each major data collection category, there are links to data collection screens where you will be entering data. For questions about how to enter specific types of activities, please see the **“Activity Insight Frequently Asked Questions”** document also available at www.ilr.cornell.edu/facultyreporting

Important things to know when entering data:

1. Once you access each screen you will see:
 - (a) A list of information already entered which you can edit, duplicate or delete. Please note that the “copy” feature will copy all information exactly as the original record. Be sure to update the appropriate information, including the date, and save those changes to avoid duplicate records.
 - (b) A button to “ADD A NEW ITEM” which you will click to gain access to the data entry screen for new information.
 - (c) Buttons that indicate “SAVE,” “SAVE AND ADD ANOTHER” or “CANCEL.” These buttons will save your work and redirect you to the next step or will allow you to return to the previous screen without saving your work.
 - (d) Click the “<” next to the heading to return to the previous screen. Click and hold the “<” to go back to the “**Manage Your Activities**” screen.

WARNING: ALWAYS MAKE SURE TO SAVE THE INFORMATION YOU WANT TO KEEP BEFORE EXITING EACH SCREEN. There are buttons at the top of the input screens to save your work. If you leave the screen without saving your work, you will lose your input.

2. In Activity Insight, there will be a carat (^) symbol next to each field name on the screen that indicates that the information may be made publically available in Vivo (University tool to publicly display faculty data) or other public sites, such as the college web site. The “Do you wish this record to be viewed by the public” question toward the bottom of the screen works together with the fields marked in this way to note information that is safe to share with Vivo. The default answer for this question comes up blank with each new record. You must choose a “yes” or “no” response in order to save the record. If you choose “yes,” the fields marked with (^) will be fed to the Vivo project to keep that information fresh. If you choose “no,” no information from that record will appear on Vivo.
3. Faculty are asked to complete all relevant fields on the appropriate screens. If you are unsure which option to choose from a drop-down list, save the record with that field left blank and contact the System Administrator for assistance. The item can be edited to change that field once the drop-down choice is identified. If a field is appropriately left blank, please do so.
4. Be sure to always enter a date (at least the year) for all entries. Entries that are not dated will not pull into reports. Publications that were entered with a “submitted” date must be revised to add the publication date onto that record when appropriate.
5. Presentations: If a paper presented at a conference was published, choose “presenter and author” as the role, and the system will also create a publication citation for that record.
6. Please note that Activity Insight does not currently have the ability to use special characters, so some items may not be able to be reported in certain foreign languages, italics, etc.

7. **Research Currently in Progress:** This field should be used to enter narrative data regarding faculty current research in progress that is not yet appropriate for the more formal data collection screens as well as additional detail about what you have reported elsewhere in the system for the reporting year. Be sure to enter the *reporting year* in the appropriate field, not the date on which you entered the data.
8. Information reported in Activity Insight is also used to report annually faculty international activity. The public flag information noted in 2 above is also utilized when reporting this activity. If you wish to receive credit for your international activities, please select “yes” for those records.

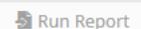
Running Reports:

Once you have entered all of your data into Activity Insight, you may wish to run a report that will show the data in a more reader-friendly format by running a report. There are a variety of reports to choose from; the report compiled annually for the Dean is “SILR.” You can use the report feature to run spell-check and review the data for accuracy; however, any necessary corrections must be made in *Activity Insight* in order to correct the report. (Please note that since the Dean’s reports are pulled directly from Activity Insight, you do not have to save and send these files to the Dean’s office.)

To run a report, perform the following steps:

1. On the **Main Menu**, click on “**Run Reports**” and choose the appropriate report title.

Run Reports

 Run Report

1 Report

Select..

2. You will then see the various options below for choosing your report parameters. The screen will default to certain parameters depending on what report you choose. The Annual Report defaults to the correct parameters except possibly the year, depending on when you run the report. If you run the report by December 31, the dates are correct for the reporting year. If you run it in January or after, you will need to adjust the year to the previous calendar year.
3. Click on the RUN REPORT button.
4. Once the report is built, you can open, edit, or save the report. The correct format for the report will be the default option for that particular report. Some reports can be run in other formats and produce results, but may not look as desired. Options for pdf or html are also often available if you wish to save the data that way.

Rapid Reports/Pasteboard:

1. Under the “Manage Activities” selection are options for “Rapid Reports,” and “Pasteboard.” Using the Rapid Reports feature is a quick shortcut to run a report and will default to the report criteria you last selected. You will be prompted through similar options as above from that window if you wish to change any of the report parameters.
2. The Pasteboard allows you to copy and paste data from another source into Activity Insight prior to pasting it into a specific field. This feature is useful if you wish, for instance, to copy an entire publication citation from a word file to the pasteboard, and then cut/paste each individual element to the appropriate fields in the publication screen without having to toggle between applications.
3. You may hide the Pasteboard by clicking the “X” in the upper right-hand corner of the box. It can also be moved around on the screen by dragging from anywhere within the pop-up box.

