

Activity Insight: Quick Start Guide

1. **Open** <https://www.digitalmeasures.com/login/montana/faculty> in a browser (any browser: Firefox, IE, Chrome, *etc.* – the more up-to-date your browser version, the less chance you will experience odd functionality).
2. **Log on** using your NetID and password
 - a. Your NetID is a seven place alpha-numeric with a standard format consisting of: letter, number, number, letter, number, number, number (*e.g.* a12b345).
 - b. If you do not know your NetID, you can find it and change the password at <http://password.montana.edu>. You will need to know your GID and MyInfo PIN to proceed.
3. **Left-hand Navigation Bar**



- a. **Manage Activities (data in)** is where you will enter, edit, review, and curate your activities.
- b. **Run Reports (data out)** is where you can run the following reports:
 - i. Data Quality Issues
 - ii. Graduate Committees
 - iii. Annual Review document
 - iv. NIH Biographical Sketch
 - v. NSF Biographical Sketch
 - vi. NSF Collaborators & Other Affiliations Information
 - vii. NSF Current & Pending Support
 - viii. Research Productivity Report
 - ix. Student Engagement Report
 - x. Vita
 - xi. and any other college/department-specific reports your dean, department head or director asked us to create for your use.

These reports can usually be run as Word documents, html, .csv, and other formats (as may be appropriate to the data). We are happy to develop any additional custom reports that may find useful to faculty and administrators and need to run on a cyclical basis.

- c. **Help** sends a help request to MSU personnel. We strive to respond within, before, or by the next business day after the request is submitted. Keep in mind that Activity insight help e-mails to MSU personnel are only monitored during regular MSU work days.
- d. **Logoff** can be found if you scroll over the “arrow” to the right of your name in the uppermost left corner of the page and will log you out of your current Activity Insight session.
- e. **Privacy Policy** (in the lower right hand corner of the screen) provides a link to detailed information regarding how Digital Measures secures your information.

4. Manage Your Activities

Welcome, Faculty X! Search All Activities...

Manage Activities [Review a guide](#) to manage your activities. [Show more](#)

- General Information**
 - Personal & Contact Information
 - Biography & Expertise
 - Web Profile
 - Appointment Data - Permanent Data | Yearly Data
 - Annual Workload Distribution
 - Administrative Assignments
 - Education
 - Graduate/Post-Graduate Training
 - Faculty Professional Enhancement Activities
 - Media Appearances and Interviews
 - Awards & Honors
 - Licensures & Certifications
 - Professional Memberships
 - References
 - Consulting
 - Previous/Concurrent Academic, Professional, Government & Military Positions
- Teaching**
 - Scheduled Teaching
 - Other Instruction
 - Directed Student Learning (e.g. undergrad/grad research, independent study, internships, non-MSU thesis/dissertation committees, etc.)
 - Graduate Committees, Dissertations, and Theses
 - Academic Advising - Undergraduate
- Research, Creativity & Technology Transfer**
 - Publications/Intellectual Contributions
 - Artistic & Creative Activities
 - Grants & Sponsored Research, Contracts, Fellowships
 - Research in Progress & Other Funded Activities (not funded through the Office of Sponsored Programs)
 - Presentations
 - Intellectual Property (e.g., copyrights, patents)
 - Biographical Sketch - NIH (2015) | NIH (pre-2015) and NSF
- Engagement, Outreach, and Service**
 - University
 - Professional
 - Public

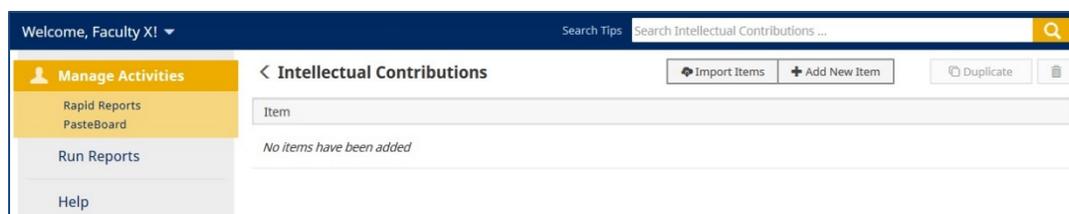
POWERED BY DigitalMeasures

[Privacy Policy](#)

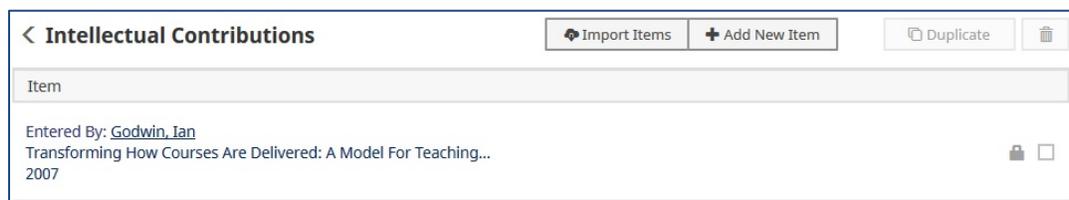
- a. This is the default navigational link activated when you log in. In other words, when you log in, you will automatically end up at the Manage Activities Main Menu
- b. There are four Sections within the Main Menu: 1) General Information, 2) Teaching, 3) Research, Creativity & Technology Transfer, and 4) Engagement, Outreach, and Service.
- c. We have pre-loaded as much data as we can from other existing MSU databases. Most pre-loaded data will not be editable. If you see omissions or errors with those items, please refer to the text at the top of the summary screen, record screen, or FAQ

http://www.montana.edu/provost/faculty/activityinsight/AI_FAQ.html) for instructions on who to contact to make additions, deletions, or corrections.

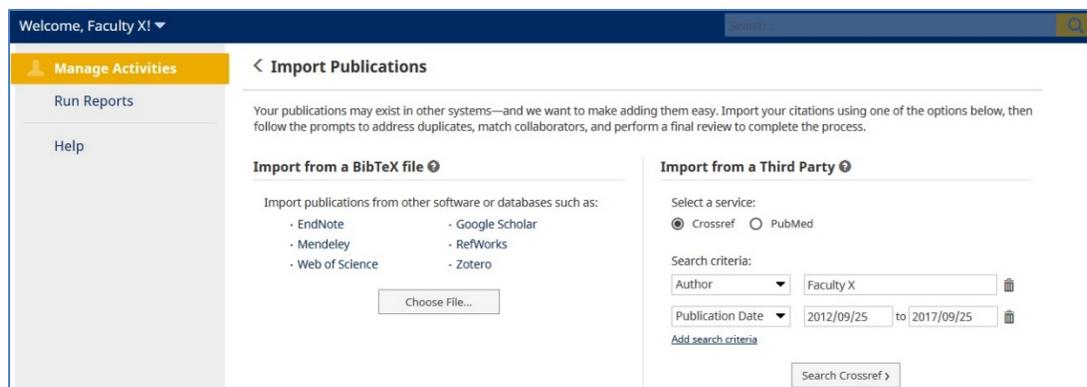
- d. Screens and individual data elements within screens are customized by college, therefore you may see some items that do not apply to you individually or as a department. If this is the case, you may skip those screens or questions.
- e. What to enter
 - i. One of the principal (**but by no means only**) uses of the data in Activity Insight is to support your annual performance evaluation. If you want your department head/chair/campus director, school director, or dean to consider an activity in your review, you should include it in your Activity Insight profile.
 - ii. Some data elements will be used by your department or college for professional accreditation and various other reporting purposes. The more data you provide up front in AI, the fewer requests you should receive to submit supplemental data (*e.g.* cv's, lists of articles published, *etc.*)
 - iii. Some other data elements are used for university-wide reporting (*e.g.* our regional accreditation process, Strategic Plan metrics). We ask you to complete as many items as you are able for use in university-wide reports. Use your best judgment.
 - iv. If you don't know where to put an activity, please ask your department head/chair/campus director where she or he would look for the information, or use the conventions of your discipline to guide you. In most cases, the drop-down menus will guide where an activity goes. If that does not help, send us your question using the Help link in the left-hand menu. Don't hesitate to ask – your question might spur a change in the screens or the documentation.
 - v. Please remember that the quality and completeness of reports run (by you, your department, college, or the university) is a direct function of the quality and completeness of the data that you enter in your profile. To assist you in identifying common data problems we have developed the “**Data Quality Issues**” report in the Run Reports section. If you run this report it will identify potential data quality issues that may reduce the quality of reporting at all levels.
- f. How to enter/correct data
 - i. There are lots of data elements, we know. The more the information is parsed going in, the more useful it is coming out. For instance, slicing citation information into small bits allows for you or your department head to create a cv, an NSF or NIH biographical sketch, department annual report, or other reports based on any style manual required with little or no editing.
 - ii. **Date ranges drive most reports**, so please enter at least the year for each activity (on most screens you will be prompted to do this before you can save new or modified records).
 1. If you can't remember the exact date(s) of an activity, do not obsess over it or spend significant time trying to track it down. The **year** of the activity is of primary importance. If you remember the month, please add that from the drop down too.
 2. Ongoing activities should include a start date with no end date.
 3. One day activities should include an end date with no start date.
 - iii. There are essentially five methods that can be used to get citation information into the Intellectual Contributions screen.



1. If you were a Faculty Activity Database (FAD, **Retired after 2012** – homegrown predecessor to Activity Insight) user, we imported your citation information from there into AI. Unfortunately, we know that the data did not transfer perfectly. The principal issue is that the structure of the data elements between the FAD and AI do not match in a 1-to-1 relationship. If you have citation data from in your AI profile that came in from the FAD, please review it to make sure the data is complete and in the correct fields. Also make sure that dates are entered where appropriate.
2. You can wait for an MSU coauthor to enter the citation! Activity Insight is a relational database. If multiple MSU Activity Insight users authored an article, there will (should) be only one record of the citation data in AI, but it will be associated with all of the authors. The first author to enter a citation will create the citation record for the other MSU AI authors. If you see a record in your list of Intellectual Contributions that says, “Entered By: *Faculty Name*”, then a coauthor has already created the record. Please do not create a duplicate record. If any of the information entered by your coauthor is incorrect, please work with that individual to correct it. Generally speaking, we subscribe to the idea that the first (or closest to the first) author should be the record owner.



3. You can import a BibTeX file. There is a good chance that citations of your publications are already stored in, or can be compiled by another software system such as a reference manager or database — for example, EndNote, Google Scholar, Mendeley, RefWorks, Scopus, Web of Science or Zotero. Those software systems enable you to pick records and then export them into a BibTeX file. Activity Insight allows you to upload that BibTeX file so that you do not need to rekey those citations. You will find details on how to export publication information from other software systems into a BibTeX file at <http://info.digitalmeasures.com/bibtex>
 - a. **This is way quicker and easier that you think!**
 - b. Most faculty have used Option A to import a BibTeX file they created from [Google Scholar](#).
 - c. However, If you are in a discipline where your citations are tracked by Crossref or PubMed, chose Option B from the *Import Items* screen (after you click the Import Items button at the top, center of the *Intellectual Contributions* screen).



4. You can use the PasteBoard feature to drag and drop within AI rather than switching between your cv and AI. Keeping in mind that some/much “grey literature” may not be indexed by Google Scholar, or other online citation/reference databases, you may need to manually enter some items. Clicking on the PasteBoard tab in the upper, right hand corner of the browser window will open a window/tool (in the lower left hand corner of your window) that will allow you to copy and paste text from another application (MS Word, etc.). You can then drag and drop elements from the PasteBoard into various data fields.



5. Finally, you can enter citation data by typing it in (not recommended unless you have exhausted all other options above).
- iv. Grants and Contracts that have been applied for through the Office of Sponsored Programs (OSP) Proposal Clearance Form are populated directly from Banner every evening. As with Intellectual Contributions, those with multiple PIs or Co-PIs, have one record shared across multiple MSU faculty. Please note that all PIs or Co-PIs associated with a record will be able to see and edit the data elements that are not locked.
 1. If you are not identified **in Banner** as being a PI or Co-PI on the grant, it will not show up in your *Grants & Sponsored Research, Contracts, Fellowships* list of activities.
 2. If you believe that a grant should be on your list, and it is not, you will need to contact the grant [Fiscal Manager in OSP](#) to have them add you to the grant in Banner (if appropriate), then it will feed/refresh in AI that evening.
 - v. Where data are pre-populated from university sources, corrections may only be made in the source data (with a few exceptions), not directly by the user in Activity Insight. The reason for this is that we want to be able to fix the underlying data if it is incorrect. If users were able to correct the data in Activity Insight, the incorrect data would still exist

in Banner, or whatever other data source the data may have come from. To make corrections to the following “preloaded” data:

1. Personal and Contact Information - Race and ethnicity - Go to [MyInfo](#), Enter Secure Area, Login, Personal Information, Update Ethnicity and Race. Once changed in MyInfo, please e-mail digitalmeasures@montana.edu with notification of the change.
2. Personal and Contact Information - E-mail address - Go to [MyInfo](#), Enter Secure Area, Login, Personal Information, Update E-mail Addresses. Once changed in MyInfo, please e-mail digitalmeasures@montana.edu with notification of the change.
3. Permanent Data & Yearly Data - Rank, tenure, FTE, or other job/position appointment information - Contact Sara King (sking@montana.edu) in Human Resources and cc: digitalmeasures@montana.edu.
4. Workload Distribution – This information is not available at the university level (after the initial Letter of Hire year). According to the Faculty Manual annual workload distribution is determined annually between the faculty member and Department Head/Chair/Campus Director based on the interest of the faculty member and needs of the department. Contact your department’s administrative associate or department head/chair/campus director if the information is not available, or incorrect on this screen.
5. Education – If your educational history is incorrect or incomplete, please download, fill out, and submit the [Degree History Form](#). If you have difficulties submitting the form with the “Submit” button, e-mail the form to digitalmeasures@montana.edu.
6. Faculty Professional Enhancement Activities – If you have attended a Center for Faculty Excellence program, those are centrally loaded every Sunday night/Monday morning. If the program you attended does not appear in your profile the week following your attendance, please contact digitalmeasures@montana.edu.
7. Scheduled Teaching (course information) - Please contact Valerie Cole (valeriec@montana.edu) in the Registrar’s Office and cc: digitalmeasures@montana.edu. Valerie will need the last four digits of your GID, the course rubric and number, semester it was taught, and CRN. Once she makes the changes in Banner, we will request a refresh of that data into AI.
8. Scheduled Teaching (course evaluation information) – This data does not currently get populated in Activity Insight on your behalf. We continue to work with UIT and their course evaluation vendor to develop a report that will allow us to export course evaluation data from their system in a format that we can use to upload it into Activity Insight. Please use the course evaluation PDF you receive from UIT Evaluation office to populate these fields.
9. Academic Advising – The number of undergraduate students advised will be pulled from Banner around the start of the pre-registration period during the fall and spring semesters. If the number does not match what you think it should be, please ask your departmental administrative staff to make sure that students are accurately assigned to you as their advisor in Banner (this is a departmental responsibility).
10. Graduate Committees, Dissertations, and Theses – This data elements that are repopulated on this screen come from Banner and are entered by the Graduate

School based on the information submitted by the student on the Graduate Program of Study and Committee Form. Contact Laura Collins (lcollins@montana.edu) in the Graduate School to address any incorrect information. Until the form is submitted and processed, the faculty will not have a record of the student on this screen.

11. Grants & Sponsored Research, Contracts, Fellowships – This data feeds directly from banner every evening and is initiated by the submission of the electronic Proposal Clearance Form (PCF). If a grant does not show up in your profile after the PCF is submitted, or a grant is listed in your profile that should not be associated with you, please contact the grant Fiscal manager in the Office of Sponsored Programs (OSP).
12. Intellectual Property (e.g., copyrights, patents) – This screen will eventually be populated by data from the Technology Transfer Office’s third-party data collection system. We are working with their vendor to be able to export the data from their system in a format that we can upload into Activity Insight.

5. Run Reports

Welcome, Faculty X! Search

Manage Activities

Run Reports

Select the report you would like to view.

| Report Name | Actions |
|--|---------|
| Data Quality Issues | 🔒 |
| Graduate Committees | 🔒 |
| MSU Generic Annual Review | 🔒 |
| NIH Biographical Sketch | 🔒 |
| NIH Biographical Sketch (2015) | 🔒 |
| NSF Biographical Sketch | 🔒 |
| NSF Collaborators & Other Affiliations Information | 🔒 |
| NSF Current & Pending Support | 🔒 |
| Research Productivity Report | 🔒 |
| Student Engagement Report | 🔒 |
| Vita | 🔒 |

- a. The Run Reports link is where you will find your annual review reporting capability. You can also create a cv, NSF or NIH Biographical Sketch, discipline-specific accreditation reports, a data quality report, list of graduate students, and potentially other reports depending on what College you are in and your security role.
- b. After selecting the report you would like to run, a contextually based list of steps will be displayed. Simply follow the number/steps (1 – x) and select the appropriate options.

Run Reports
Run Report

1 **Report**

MSU Generic Annual Review
▼

[Download this report's template](#)

2 **Date Range**

Start Date

Jan ▼
01 ▼
2015 ▼

End Date

Dec ▼
31 ▼
2015 ▼

3 **File Format**

File Format

Microsoft Word (.doc)
▼

Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size

Letter
▼

- c. Most of the reports are date defined. In other words, the person running the report defines the time frame for the data elements being pulled into the report. This presents some issues where activities have been added that do not have dates associated with them. By default, if there is no date associated with an activity (presentation, media contribution, intellectual contribution, *etc.*), those items automatically pull into reports regardless of the time frame specified (the activity could have happened several years before or after the specified time frame, but the system has no way of knowing that). Of course this reduces the validity of the reporting. If you run a report and see undated items, please go back to the record (or if it is someone else's record, ask them to) and add a date to it.
 - d. Department heads, directors, and deans can run reports on the faculty activity within their departments, schools, or colleges.
 - i. You may see people on the list of faculty you don't expect. There is a data-driven reason for including people who have left MSU or who are not on faculty appointments (generally so their grants will load for their co-PIs who are current faculty). If you see something that does not make sense, please contact us at digitalmeasures@montana.edu.
 - ii. Grant and contract reports at the department or higher level may not be comprehensive. This will be less of an issue for grant activity from 2011 forward. If you want to run "comprehensive" reports on grant and contract activity for a unit that includes individuals not loaded into Activity Insight, contact the Office of Sponsored programs (OSP).
 - e. You can generally export reports as MS Word, pdf, html, and/or .csv/Excel files. They are editable in related software package.
6. **Help**
- a. Visit the Activity Insight User Guide: <https://www.digitalmeasures.com/activity-insight/docs/guide.html>.
 - b. Click on grey question marks next to individual items for definitions.
 - c. Use the link on the left-hand navigation bar called "Help".