Activity Insight User Guide

Contents:
- Overview
- Who is Required to Report
- Accessing System
- Reasons for Collecting Data
- Entering Activity Information
  - Manual Data Entry
  - Import Tool
- Selecting Activities for Web Profile
- Running Reports
  - Customized Reports
  - Ad Hoc Reports

CALS Faculty Data Collection: A Brief Overview
Activity Insight is the tool that CALS uses to track faculty scholarly activity and accomplishments, and provide content for various websites and other applications that feed public-facing profiles on Cornell sites. Accurate, thorough entry of this information is critical. The data from Activity Insight is also used to measure departmental productivity.

Activity Insight is open to you all year, except for a brief period in the Spring when it is closed for reporting purposes. It is generally advisable to enter items into the system soon after you complete them, keeping your records current.

Who to contact for questions: College Administrator, Chris Savino (cjs345@cornell.edu).

*Please note that the screenshots used in the explanations below may not be representative of the current screens within Activity Insight. The functionality within each page is the same, though the page navigation may be slightly different.

Who is Required to Report
- Annual reporting to the Senior Associate Deans requires that all Professorial Staff and Senior Academics report their activities.
- Those who have web profiles where your Department is pulling data from Activity Insight to populate the web profiles should report their activities.
- Extension/Outreach activities should be reported by anyone who has presented information to the public, has collected data or provided research to support the extension/outreach activity, or will be included as an author on an extension/outreach presentation.
  - These type of activities can be both academic and staff positions.
  - Each person should report their own activities, if possible, and should not be added to activities of the program leader.
Accessing Activity Insight

- Open your web browser (Internet Explorer and Firefox are supported best)
- Go to https://activityinsight.cornell.edu. If you have difficulty accessing AI using this link, copy the link into your web browser.
- If you do not have an active account in Activity Insight, please contact the CALS College Administrator

If you are already logged into a Cornell system application, you will be brought directly to the Digital Measures/Activity Insight welcome screen (Digital Measures is the company that develops and supports the Activity Insight program). If not, you will be brought to the Cornell login menu. If brought to the login menu, type in your NetID and password (the same one used for email).

For an overview of what to review and the activity category screens available, please review the Data Entry Responsibility (with Template) or Data Entry Responsibility (without Template) documents provided in the “Useful Activity Insight Documents” menu on the right side of the CALS Activity Insight Reference Page.

Reasons for Collecting Data

The data collected within the Activity Insight system is used to report various activities to the Senior Associate Deans and others so that they can make strategic decisions and support requests for promotion/tenure. It is also used to populate faculty and academics’ web profiles or other outward facing applications, many of which researchers and students utilize as resources for identifying academic or collaboration needs. Information is also collected for CALS Extension and Outreach efforts to report to SUNY to support state funding and to others interested in CALS extension/outreach efforts.

How to Enter Activity Information

Manual Data Entry

Faculty have an option of submitting their activities via an Activity Data Entry Template to CALS staff who will manually enter the data themselves. It is advised that faculty use the templates that are sent in a communication from the Senior Associate Deans near the end of each year. This will allow faculty more time to focus on instruction, research or extension/outreach activities. The Activity Date Entry Template is also available on the CALS Activity Insight Reference Page.

If you plan to enter data into Activity Insight, Identify the activities that would need to be entered. Determine what screen the information should be entered into.
- **Publications**
  After opening the Publications screen, enter as much information you have for the fields displayed. Remember to Save each record when you have completed your entry. When selecting Journal Articles as the Contribution Type, the Journal Name field will show various Journals we have listed in a Journal Instrument.
  - As you type within the Journal Instrument name field, your search will become more refined.
  - If you do not see the name of the journal appear, consider spelling abbreviations or other inconsistencies in the naming convention used. If still not found in the available dropdown, type in “Not in List” and enter the name of the journal in the field below labeled “Journal Name, if Not in List”.
  - More fields will appear if you have selected “Not in List”. See screen shot below. The most important field to be entered in the “Journal Details” is the “Peer Reviewed/Refereed?” field since reporting of this journal uses this field to determine the category of the publication (whether it will appear as a peer reviewed publication or not). Other fields found in the Journal Details section for the “Not In List” selection does not need to be populated because CALS staff entering the data will research and identify this information for Journals that will be added to the Journal Instrument at a later date.

- **Presentations**
  Your instructional or research presentations are entered in the “Presentations” screen. For Extension/Outreach presentations, a decision needs to be made if you would like any of the presentations shown on your web profile.
  - If you do not want any of the Extension/Outreach presentations to appear on your web profile, enter the data into the “Annual Extension/Outreach Presentations” screen.
If you want an Extension/Outreach presentation to be displayed on your web profile, please enter the details of the presentation in the Presentations screen. Please answer the question "Was this presentation directed primarily toward New York State residents and were participants required to enroll or register for the presentation or event?" and provide the counts, if answered "Yes" for the 3 fields listed under the “If you answered yes for NYS residents and registration/enrollment, please answer the following questions (if “No” skip these):”. If entering Extension/Outreach activities in the “Presentation” screen, it is not required for you to include these activities in the “Annual Extension/Outreach Presentation” screen.

- Other Screens
  Besides the Publications, Presentation, and Annual Extension/Outreach Presentation screens, there are other screens that you will need to review and update. For example, if you have received an award or honor during the year, you will need to update the Awards and Honors screen.

Import Tool

The import tool directly tied to Activity Insight is the easiest way to import your publication(s). Currently there are four sources available within the “Import from a Third Party” tool as free search engines to access references and abstracts of various publications, and a fifth source, ORCID, if you’ve successfully obtained an ORCID ID and affiliated it with Cornell University. Instructions on how to do his are available on the CALS Activity Insight Reference Page.

- PubMed
- Web of Science
- Crossref
- Scopus
- ORCID (coming soon)

To begin the import process

- Access “Publications” within the “Intellectual Contributions” section of AI.
- At the top of the “Publications” screen click the “Import” button (see Figure 1).

Figure 1

You are currently managing data for Alireza Abbaspourad.

- You are provided two options in the “Import Publications” screen, use the one located on the right called “Import from a Third Party” (see Figure 2). Using “Import from a BibTex file” may cause issues and is more difficult process to use.
Next you will select the database you want to search in by clicking on “Select a Service”.

**Recommendation:** From the four sources you choose to import from, you can further limit your results by adding a second “search criteria”, such as a year or date range.

Limit the search criteria by clicking on “Add search criteria” this will provide you with a drop down where you can select “Date: Publication”. (see Figure 3)

If you opt to refine your search be sure to enter the information requested then click the “Search” button. This searches the database you have selected and will return all citation results if available within that database.

**If results are NOT found in the search,** return to the “Import from a Third Party” search screen by clicking the “Cancel Import” button at the top of the screen. Select another database source from the list “Select a service” and continue searching all databases until you have imported all the publication(s) that are available. If you are **NOT** able locate a publication(s) you will have to manually enter the publication(s).
**Step 1 Import Items: Select Records to Import**
- In the results found, search for item(s) that you would like to import. You may open the record by clicking on the title which will bring up a preview of the record for you to review before selecting it. Once you have identified the record that you would like to import check the box to the right of the screen. (see Figure 4)

**Figure 4**

![Import Items: Select Records to Import](image)

- Click the “Continue” button at the top of the screen after you have selected all the items to be imported. This completes step 1 of 4 within the import function.

**Step 2 Import Publications: Duplicates**
- Step 2 will inform you of any possible duplicate(s) that may already be in your AI profile possibly from the previous year. (see Figure 5) At this point you have two options to “Skip” or “Import” after looking over the information you will need to decide whether to create a duplicate of an existing record or skip the import of that particular record by clicking on “Skip” or “Import”. After choosing the appropriate button, it will then turn **RED**. Complete this task for all the duplicates that are potential matches by clicking on the arrow to the right of “Potential Match 1 of X”, where X represents the number of records.
Once all potential matches are marked as “Skip” or “Import” (turned RED) then click on “Continue” at the top of the screen.

**Step 3 Import Items: Matching Collaborators**

- This step will attempt to identify users within Activity Insight that work within Cornell University. (see Figure 6)

*Figure 6*
• **Note:** Only your personal user account should be matched, even if other authors are Cornell staff or faculty are listed you will want to deselect their user accounts using this screen. To accomplish deselecting account(s) follow the directions below.

  a. If you do not see your name listed in Figure 6 above skip to step “b”. If your name shows in Figure 6 above click on “Select correct user account,” and select your name from the list. The result should be “Select a different user account”.

  b. To deselect Cornell staff or faculty click on “Select a different user account” associated with their name then click on “View all user accounts” (see Figure 7) below.

  ![Figure 7](image)

  c. Next in Figure 8 below click “No Matching Account”

  ![Figure 8](image)

  d. Repeat this process until the names in the “Import Items: Match Collaborators” window show as “Match to a user account” as seen at the bottom of Figure 6 above then click “Continue”.

**Step 4 Import Items: Review and Finish**

• This step will show the list of record(s) to be imported to your list of publications.

• **Note:** There can be more than one record. To access other records click on the right arrow next to “Record 1 of X”, where X represents the number of records. You can scroll down through the record by using the scroll bar located on the right-hand side. (see Figure 9)
At this point, you will need to finish the import by clicking on the “Finish Import” button at the top of the page.

**Step 5 Importing Publications Using the Import Items Tool**

- After importing the publication the final step is to be sure to address any duplicates (*see instructions below: “Handling of duplicates”*) you may have created during the import process (from Step 2 above).
- Also you will need select the “Contribution Area” of Instruction, Research or Extension/Outreach for each and every one of the publication(s) you have imported. (see Figure 10)

**Handling of duplicates**

- During the import process in Step 2 of this document if you had selected the “Import” button you had created a duplicate entry within your list of publications.
- *Before you just delete the duplicate entry* there is one *very crucial step* you need to follow. Open the original entry that was duplicated and look at the details within that publication.
Within the details be sure that in the list of author(s) there is only one person (yourself) listed under the “People at Cornell University” (on the left side). If that is the case you can delete this entry. If not then you should not delete this entry or it will delete it from the other author(s) that was linked within that publication. If anyone else had originally linked you to a publication (indicated by “Entered by XXXXXXX” in the Publications screen – see Figure 11) this publication will be locked and you will not be able to delete or edit this record.

**Figure 11**

To have the record(s) unlinked and correctly shown in Activity Insight please contact your College Administrator, Chris Savino (cjs345@cornell.edu) to assist you.

**Bibtex Import Tool - not recommended but you can use it**

At this time, we have identified technical issues with using the import function of “Import from a BibTex file.” We ask that you please do not use “Import from a BibTex file” tool within the Activity Insight “Import Publications” screen.

If the issues are resolved, we will communicate on how to use this functionality.
How to Select Activities to Show on Your Web Profile

It is up to each CALS department to identify if they will be pulling data from Activity Insight into web profiles and who will be able to have a web profile. Please check with your Department Chair Assistant or Department Web Services person to determine if you will have a web profile with information pulled from Activity Insight.

If your department provides a web profile using Activity Insight information, then you will be limited to select 10 publications and 10 presentations. You can use an interactive web tool to help you relate Activity Insight information to your web profile. This tool will help you understand what fields in Activity Insight would need to be updated if information is not showing or is incorrect on your web profile. This tool is called the “Example Web Profile to AI interactive map” and can be found on the CALS Activity Insight web page in the “Useful Activity Insight Documents” menu on the right side of the screen.

For publications, please open the specific publication you would like to have shown on your web profile and go to the row containing your name as an author and update the question “Is this a selected publication?” to “Yes” and also make sure that the question at the bottom of the page labeled “Do you wish this record to be viewed by the public?” is also “Yes”.

For Presentations, the fields that would identify a record to be picked up for display on a web profile are found at the bottom of the screen. Again, both fields would need to be “Yes”. See screen shot below for an example.
How to Run Reports

Customized Reports

Certain reports have been created and made available based on access rights. There are certain reports that can be run by various colleges and then others were developed and labeled specifically for a particular college. The reports that were created for a specific college have the college’s name at the beginning of the report title.

Go to Run Reports in the main menu. Scroll to the report you would like to run and select it.
Choose the date range to be included in the report and select who should be included in the report (by individuals, certain departments, or the whole college) by clicking on “Change Selection” link in Section 2 “Whom to Include. See example below.

After saving your selection(s), then click the “Save” button which will return you to the criteria report screen and click the “Run Report” button. You will then be able to run the report.

If you would like to see the criteria used for a Custom Report, you can click the “Download this report’s template”. This will show you for each item reported what screen the data is pulled from and the criteria used against that screen.

Ad Hoc Report Creation

You are able to create your own report by clicking on the “Create a New Report” in the Run Reports selection from the main menu. You will have to complete 6 steps to create an ad hoc report.

1. Select the date range for your report
2. Select who you would like to include in your report.
3. Select what screens and data from the screens you would like to have included.
4. You could group the report by individual or other groups.
5. Specify text you want to use to find records within the screens you have selected for your report.
6. Choose the file format for the resulting report.
You can save the report structure for you to alter and/or re-run later. After you have completed the 6 steps to create the ad hoc report, select the “Save” button at the top of the page and create a name for your report. Recommendation would be to create the report name in the following format: Your name_Report Name so that you can easily identify your ad hoc reports from the Customized Reports.