Activity Insight User Guide

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CALS Faculty Data Collection: A Brief Overview
Activity Insight is the tool that CALS (along with several other colleges at Cornell) uses to track faculty scholarly activity and accomplishments, and provide content for various websites. The data from Activity Insight is loaded into Scholars@Cornell and other applications that feed your public-facing profile 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, Dianna Burger (dhb226@cornell.edu).

Who is Required to Report
- Annual reporting to the Senior Associate Deans requires that Senior Academics and Professorial staff to 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 Kerberos, 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 Kerberos login menu. If you are brought to the login menu, type in your NetID and Kerberos password (the same one used for email).

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

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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 for other researchers and students used to identify the proper academic staff member for advising or collaboration. 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.

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How to Enter Activity Information

Manual Data Entry

Faculty have an option of submitting their activities via a template to the Activity Insight Data Entry Team or manually entering 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.

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, your search will become more refined.
- If you do not see the name of the journal, then 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 the CALS Activity Insight Data Entry Team 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.

**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 that can be picked up for display on a web profile is 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 criertia 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.