Activity Insight (AI) Administrator’s Guide

There are six administrative roles we will use to manage information in AI:

University Administrator (also called Digital Measures Administrator)
University (leaders)
University Limited Administrators
College (leaders)
College Limited Administrators
Department Chairs/Center Directors/Program Directors

This guide explains how to use the various tasks assigned to each role.

**Part 1. AI Administrators access to “Manage Your Activities” and “Run Custom Reports”**

AI Administrators who also are faculty will be able to use the **Manage Your Activities** task to enter information about their performance. AI Administrators who are staff will **not** use **Manage Your Activities**.

AI Administrators who are faculty or staff will be able to use **Run Custom Reports**, although they will have more custom reports available to use than faculty will have. AI Administrators will have access to custom reports related to accreditation for their College/School or for their Department/Center/Program as well as other custom reports.

Here is a sample of the custom reports administrators can run:

Annual Report on Faculty Scholarship (part of the Annual Report requested by the VPAA)
Contracts, Grants, and Sponsored Research by Faculty
Creative Works by Faculty
Editorial and Review Activities by Faculty
Public Service by Faculty
Publications by Faculty
Presentations by Faculty

See the *Activity Insight Faculty/Staff Guide* to learn how to use **Manage Your Activities** and/or **Run Custom Reports**.
Part 2. Additional Tasks Available to all AI Administrators

In addition to Manage Your Activities and Run Custom Reports, the AI Administrators serving as Department Chairs, Center Directors, Program Directors, College leaders, College Limited Administrators, University leaders, or University Limited Administrators will have two tasks they can use.

- Manage Data
  manage someone else’s data on general information and teaching, research and service activities

- Run Ad Hoc Reports
  run ad hoc queries on the data so you can conduct further analysis in a statistical package such as SPSS or Microsoft Excel; or simply obtain data on a particular field, such as number of books published

They will also see a “Change your Password” link. AI administrators do not need to use (nor should they) use the “password” task because there is not a new password created to use AI. Villanova faculty and AI Administrators will have access to AI once they login to the Villanova home page. They will just need to click on the link, Activity Insight, from the Villanova homepage.

2.1. Manage Data

There are two options to the Manage Data task: “Manage Data for Users” and “Manage Administrative Data for Users.”

I ask that you use only the “Manage Data for Users.” Please do not use the “Manage Administrative Data for Users” option. Your University Administrator will do all the tasks associated with the “Manage Administrative Data for Users” option.

Step 1: To use “Manage Data for Users”, you can select a user (i.e. faculty member) from the drop-down box and click the Continue button. To select a user, rather than scroll through the alphabetized list of names, you can type the first letter of the user’s last name and the list will move to the names beginning with that letter – then select the name. You will be able to enter data and edit all records for that user.
Remember to click one of the Save buttons at the bottom of any screen you edit in order to save the data you entered for that user.

Because we upload faculty data from Banner to complete most fields in the Administrative Data screens (Permanent Data and Yearly Data), please do not access these two screens when managing data for a user.

The exception could be to add information about a new faculty member employed after the date on which the University Administrator has uploaded data from Banner. If you have a question about entering Administrative Data, contact your University Administrator using the Submit Your Feedback link.

Step 2. When you finish managing data for the user, click End at the top – right side of the Main Menu screen.
2.2. Run Ad Hoc Reports

You can create a report for any screen and any field in the AI database. To create a report, click on the Run Ad Hoc Reports and follow the seven steps listed there.
If you need an explanation of each step, click on the *More Information* link and a window will open containing additional information. When you have finished reading the information, click the “Close Window” link at the bottom of the window. Here is an example for “Selecting the date range to use.”

**Step 1. Select the instrument to use.** Villanova is using only one instrument named the “Activities Database-University” so that instrument will be selected for you.

**Step 2. Select the date range to use.** You enter the start date and end date or check the “All Dates” box.

**Step 3. Select the data to include.** This option allows you to only include responses to certain items in the report. Click the *Click here* link to open the pop-up box.

In the pop-up box, you can choose to either include all items for which data were collected in the report or to include only data from specific items. This choice is made by either clicking to include "All data" or by clicking "Only include items checked below" at the top of the pop-up box. Rarely will you want to run a report with “All data” in Activity Insight. Such a report would be very large.
If you click "Only include items checked below," you will then need to click the checkboxes next to the items you would like to include on the reports. There are five categories of data: data from items common to all Colleges/School and data from items unique to each College/School (so Arts and Sciences, Nursing, Engineering and School of Business).

If you click the empty checkbox next to a category, such as “Common Items”, then all screens listed will appear and be checked (see screen shot below). If you do not want to use all screens, then just click the checkboxes next to the screens you do not want to use.

![Screen shot showing checkboxes for data categories.]

An alternative approach is to click the checkbox next to category, such as “Common Items”, to remove all of the checks next to the screens. You can then select the screens you want to use by checking the box next to the screen.

![Screen shot showing checkbox for Commissioned Items.]

Another way to open the list of screens is by clicking the box with the plus sign. Once you do the plus changes to a minus sign and all screens appear.

![Plus to Minus](image)

To close the list, you click the minus sign.

You view items listed on each screen by clicking the checkbox next to the screen, or by clicking on the plus sign or by clicking on the name of the screen. For example, if you click on the name of the screen, such as “Academic Advising” then all fields included on that screen appear with a box. All boxes will appear checked so you click on the check to remove it.
Instead of clicking on the name of the screen to open the list, you can use the box with the plus/minus signs to open the list of items on that screen and none of the boxes will appear checked. You can then check the boxes next to the items you want to use in the report.

**Remember** the key is to check the boxes next to the screens and fields you want to use in the Ad Hoc Report and then click **Save** at the bottom of the screen.

**Step 4. Select how the data should be organized.** Organization is the way that data are categorized in reports. All reports must use some method of organization. There are three options to organize data: by College/School, by Department/Center/Program or by Individual. For example, if organization is requested by “Department/Center/Program,” one report will be built for each department, center and program you select in Step 5.

**Step 5. Select who to include.** This option allows you to obtain reports with data from only specific Colleges/School, Departments/Centers/Programs, and/or people. Click the **Click here** link to open the pop-up box.
Click on the option you wish to use and then click on the box next to organization or person you want to include.

Then click **Save** at the bottom of the screen.

**Step 6. Select the file format.** This option allows you to select the file format you would like. The file formats that are available are:

- Adobe PDF - These reports are in Adobe PDF (.pdf) file format. Adobe PDF files are able to be opened by nearly any computer, regardless of operating system.

- Microsoft Word - Reports in Microsoft Word format are able to be opened by any version of Microsoft Word (97, 2000, XP, 2003, Office 2007, etc.). You will be able to edit the Word document.

- HTML (Webpage) - Reports in HTML format are able to be posted to a website very easily.

You can also choose “Raw data, comma delimited” and “Raw data, XML.”

**Step 7. Select the orientation and paper size.** This option allows you to select the page orientation you would like reports to be in. The two orientation possibilities are portrait and landscape. Reports that use portrait orientation are 8 1/2 inches wide and 11 inches long. Reports that use landscape orientation are 11 inches wide and 8 1/2 inches long. Paper size A4 is an international standard size that is slightly larger than Letter size so using A4 will make the document difficult to print unless you have the correct paper.

After **Step 7**, click the **Continue** button at the bottom of the screen. The next screen allows you to review the parameters you have selected, to see how many “instruments” (faculty accounts)
will be in the report, and to select how “comprehensive” you want the report. The content of this screen will vary depending on the parameters you have selected. When you are ready to run your report, click the **Build Report** button at the bottom of the screen.

### Part 3. Additional Tasks Available only to College Limited Administrators, University Limited Administrators and the University Administrator

Three additional tasks available to a Limited Administrator are **Dashboard**, **Usage Statistics** and **Users and Security**. If you also see the **Set-Up** tab, please do not use this task because the University Administrator has taken care of this task.

#### 3.1 Dashboard

The **Dashboard** provides important details about your use of AI. Every time you access the **Dashboard**, it is refreshed to reflect your campus’ most recent activity in the system and new system functions. While the sections that appear on the Dashboard may change over time, it will always contain two sections: “Additional Features” and “Usage Statistics.”

“Additional Features” alerts you to new system functions that can be added at no additional cost (see screenshot below). These are new features or features that you are not currently using. Click **How?** next to a feature to find out more about it or to start using it. If you have questions or suggestions about these additional features, please contact your University Administrator using the **Submit Your Feedback** link in AI. Only your University Administrator can contact Digital Measures to begin using these additional features.
The “Usage Statistics” task is explained in the next section.

3.2. Usage Statistics

In addition to viewing usage statistics from the Dashboard, you can use the Usage Statistics tab to view the usage statistics of your users (anyone for whom you have security). You can view the number of records added or edited in the past 8 hours, 1 day, 2 days, 1 week, 1 month, 6 months and 1 year. You can drill into the statistics all the way down to view statistics on a user-by-user basis.

3.3. Users and Security

Users and Security enables you to maintain accounts in the system. You can add, search for, disable and
delete users. You can also view and modify the security roles that are assigned to your users. Please be careful how you use Users and Security to create and modify accounts.

The “Search Users” box allows you to easily find a user. Enter the information you know for the user to search for his/her account.

An alternative way to find a user is to select from the list in the bottom section of the screen. The bottom section of the screen lists the user accounts that exist in the system to which you have access.

Clicking on the pencil icon for a user allows you to perform functions specifically for that account. This allows you to request the account’s password be emailed to the user, update the account’s details, enable/disable, or delete the account.
Please comply with the following Villanova Guidelines for using these functions:

1. Please do not delete any faculty users. Only delete staff or student users who have been given accounts to help manage data for users or to help run reports and they no longer need accounts.

2. Please do not disable any faculty users. Villanova’s Office of Academic Affairs staff will perform this task when a faculty member is no longer with the university.

3. Only update “user account details” for faculty when there is a change in position, such as Department Chair, Center Director, Program Director or College leader (e.g. a new Associate Dean).

4. Please do not create more College Limited administrators and do not update the account of a current College Limited Administrator. Instead ask the University Administrator to update accounts related to College Limited Administrators.

5. You can update user account details for staff or students who are given accounts to help manage data for users or to help run reports.

6. You will not need to use the “Request Password” function for faculty because once the user has logged into Villanova’s home page, he/she will be able to click on the Activity Insight link to use AI. If for some reason, a user such as a staff member or a student cannot use the Activity Insight link, then you can have a password created for them and have them use “local authentication” (see creating an account below) The user will use this password to log into Activity Insight via the Digital Measures web site.

7. You may need to create an account for a new faculty member. Before doing so please consult with the University Administrator.

To create an account, click on the “Add a New User” button.
Complete the following fields (see screenshot below):

Last Name (required)
First Name (required)
Middle Name/Initial
Email (required; use Villanova email only)
Username (required; the username is the name used in the email address before the @ sign; for example, craig.wheeland)
Faculty ID (this is the eight digit Banner ID number Villanova uses)
Authentication (portal authentication is preferred so users can click on the Activity Insight link; if a separate password is needed for a student or staff member, then use local authentication for that user)

Next, if you are creating an account for a faculty member, choose “yes” to the question: Do we need to keep track of this user’s teaching, research and service activities? (see screen shot below). If you are creating an account for a staff or student, remove the checkmark from the “Yes” box.
Next, if you selected “yes”, you choose a College/School affiliation for the user from the drop-down menu.

Then you choose the main Department/Center/Program affiliation for the user from the drop-down menu by checking the appropriate box in the list. For faculty this will almost always be their home department.

**Remember:** you must choose a College/School and Department/Center/Program for the user if we are to keep track of the users’ teaching, research and service activities.
Finally, for both faculty and staff, you choose the security role for the user by checking the appropriate box in the list (see screen shot below). Remember – please do not create any roles with “Limited Administrator” in the name. Remember to click Save.

Choose the security roles for this user.

- If a role has a grayed-out checkbox, submit a work request to give the role to the user.
- Users with multiple roles have the permissions for all of the roles.
- To view the permissions associated with a role, click the Details link.
- To add, change or delete security roles, submit a work request.

If you have suggestions on how to improve this Guide, please contact your University Administrator using the Submit Your Feedback link in AI.

Dr. Craig M. Wheeland, Associate Vice President for Academic Affairs, and Mr. Richard E. Wack, Instructional Technology Analyst, prepared this Activity Insight Administrators Guide for Villanova University based on information provided by Digital Measures.