

# Activity Insight

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A Guided Tour





# Agenda

**Introduction**

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**Utilities Overview**

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**Reports Overview**

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**Tips & Tricks**

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**Help**





# Introduction

- Activity Insight organizes and builds reports on teaching, research and service activities
- Enables you to keep track of your activity information just once so that many outputs can be prepared
- Morehouse School of Medicine will be using Activity Insight for the following purposes:
  - Faculty Activity Reports
  - CVs
  - Biosketches
  - Accreditation Reports (forthcoming)
  - Faculty web profiles (forthcoming)
  - Faculty evaluations (forthcoming)
- Assists your administration in responding to requests for faculty-related data, rather than needing to continually ask you for the information





# Logging In and Re-Setting a Password

1. Enter the following URL into your browser of choice:  
<https://www.digitalmeasures.com/login/msm/faculty>
2. If you know your username and password, simply enter them into the corresponding fields and click “Log In”
3. If you need to re-set a password, select “Need help?” on the lower left
4. A “Get Login Help” window will open; select the “Reset Your Password” link
5. Enter your email prefix in the “Reset Password” window (everything before the “@” sign)
6. Retrieve your one-time-use password reset email from your inbox; you’ll need to enter your username (typically your email prefix) and a new password
7. You’ll then be directed to the system to manage your activities





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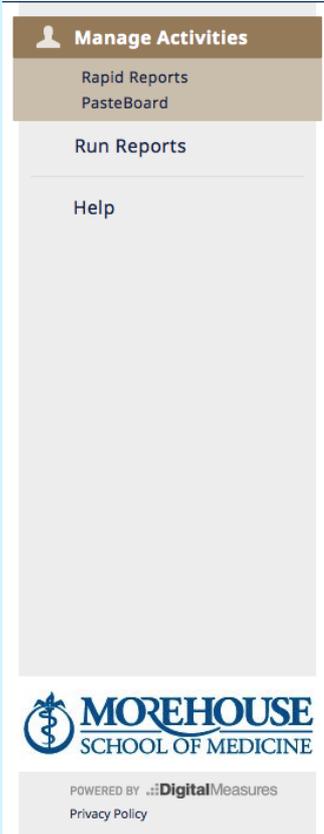
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**Help**





# Utility Overview: Left-Hand Menu



- The left-hand menu displays at least two main utilities: Manage Your Activities and Run Reports
- Manage Your Activities: Add or update information about the activities you accomplish
- Run Reports: Generate reports instantly that have been custom-built for your campus
- Help: Submit suggestions on how to improve the system, questions about how to use the system, or report system errors





# Utility Overview: Manage Activities

- When you first visit the main menu of Manage Activities, spend a few minutes looking through the “screens” – which are split out into six groups:
  - General Information
  - Teaching
  - Scholarship/Research
  - Service: Non Clinical
  - Service: Clinical and Patient Care
  - Annual Self Evaluation
- To access a screen, just click its name; the resulting screen, called a “Summary Screen,” displays records that are stored within that screen

The screenshot shows the 'Manage Activities' web application interface. At the top, there is a navigation bar with 'Welcome, Sample Faculty!' and a search bar labeled 'Search All Activities...'. Below the navigation bar is a sidebar menu with 'Manage Activities' selected, and sub-items: 'Rapid Reports', 'PasteBoard', 'Run Reports', and 'Help'. The main content area is titled 'Review a guide to manage your activities. Show more' and is divided into three sections: 'General Information', 'Teaching', and 'Scholarship/Research'. Each section contains a list of activity categories. The 'General Information' section includes: Personal and Contact Information, Permanent Data, Yearly Data, Academic, Government, Military and Professional Positions, Administrative Assignments, Awards and Honors, Consulting, Education, Post Graduate Training Residencies and Fellowships, External Appointments and Partnerships (Private Companies and Pharmaceuticals, etc.), Faculty Development Activities Attended, Licensures, Certifications and Recertifications, Media Contributions, Professional Memberships, and Workload Information. The 'Teaching' section includes: Advising/Mentoring, Directed Student Learning (e.g., theses, dissertations), Non-Credit Instruction Taught/Lectures, and Scheduled Teaching. The 'Scholarship/Research' section includes: Biographical Sketch - NIH (2015) | NIH (pre-2015) and NSF, Contracts, Grants and Sponsored Research, Publications, Intellectual Property (e.g., patents), Presentations, and Research Currently in Progress/Pending Activities. At the bottom left of the page, there is a logo for 'MOREHOUSE SCHOOL OF MEDICINE' and a footer that reads 'POWERED BY DigitalMeasures Privacy Policy'.





# Utility Overview: Manage Activities

## **Saving Records**

- When working in the system, it is important that you preserve modifications by selecting one of the Save buttons at the top of the screen
- If you attempt to navigate away from a screen containing unsaved changes, a warning message will display to determine whether you would like to return to the screen and save your modifications before proceeding

## **Customizations**

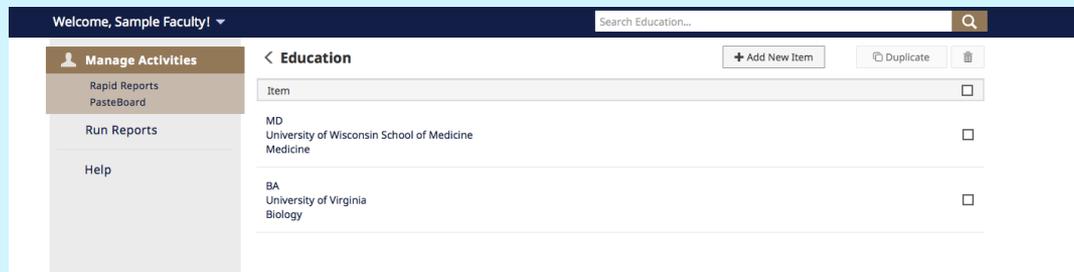
- The screens available from the Manage Your Activities tab and all of the fields on them have been customized for your campus – and can be further revised based on your recommendations
- To propose changes, contact your Administrator (Alicia Gibbs)





# Utility Overview: Summary Screen

- There are six possible Summary Screen actions:
  1. To add a new record, select the “Add New Item” button
  2. To import new items in bulk, select the “Import Items” button (only available for the Publications screen)
  3. To delete a record, select a check box and then click the trashcan icon
  4. To edit a record, click anywhere within the record’s row (which will be highlighted in gray when you hover over it)
  5. To copy a record, select the appropriate check box and then click the “Duplicate” button
  6. To search for a specific record, enter your desired terms in the search bar at the top right of the screen





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# Reports Overview

- This utility allows you to run reports that have been custom built into the system for your campus
- To run a report, simply select from the steps on the page
- The reports that are available from step number one have been customized for your campus

Welcome, Sample Faculty!

Manage Activities

**Run Reports**

Help

**Run Reports**

1 **Report**  
Faculty Activity Report  
[Download this report's template](#)

2 **Date Range**  
Start Date: Jan 01 2016  
End Date: Dec 31 2016

3 **File Format**  
File Format: Microsoft Word (.doc)  
Page Size: Letter  
Changes made to the Microsoft Word document will not be reflected in the system.





# Reports Overview

- The reports that are available to you currently are the following:
  - Faculty Activity Report
  - NIH Biographical Sketch
  - NSF Biographical Sketch
  - Standard CV





# Reports Overview: Faculty Activity Report

- Built by Morehouse School of Medicine to facilitate your annual evaluations
- Sections of the report:
  - A: Teaching Encounters
  - B: Professional Service / Administrative
  - Scholarship / Research
  - Clinical Service without Learners
- To see the structure of this report, click “Download this report’s template” below the report’s name in the Run Reports utility

MOREHOUSE SCHOOL OF MEDICINE  
FACULTY ACTIVITY REPORT  
For the Period [Report Start Date] - [Report End Date]

**A. TEACHING ENCOUNTERS** **% Effort [Teaching Workload Percentage]**

**1. CLASSROOM.**

Course	Course Level	Number of Hours
<small>Screen: <i>Scheduled Teaching</i> Rows: All records</small>		
[Course Prefix] [Course Number] [Course Name]	[list of (Course Audience) separated by ", ", (Explanation of *Other*)]	Number of hours of direct instruction/supervision
Total Direct Student Contact		(Sum of "Number of hours of direct instruction/supervision" hours)

Total hours of classroom teaching for the period: [1]

**2. CLINICAL TEACHING WITH LEARNERS.**

(Clinical Teaching with Learners)

Type of Encounter	Type of Learner	Location	Time	Number of Hours
<small>Screen: <i>Clinical Service with Learners</i> Rows: All records</small>				
Clinic Session	list of [Type of Learner] separated by ", "	[Location] or [Explanation of *Other*]	Clinic Session, how many 1/2 days	Number of Hours of Direct Instruction/Supervision
House Call	list of [Type of Learner] separated by ", "	[Location] or [Explanation of *Other*]	In house call, how many days	Number of Hours of Direct Instruction/Supervision
Home Call	list of [Type of Learner] separated by ", "	[Location] or [Explanation of *Other*]	At home call, how many days	Number of Hours of Direct Instruction/Supervision
Operating Room	list of [Type of Learner] separated by ", "	[Location] or [Explanation of *Other*]	Operating room, how many days	Number of Hours of Direct Instruction/Supervision
Ward Attending	list of [Type of Learner] separated by ", "	[Location] or [Explanation of *Other*]	Ward attending, how many months	Number of Hours of Direct Instruction/Supervision
Consult Service	list of [Type of Learner] separated by ", "	[Location] or [Explanation of *Other*]	Consult service, how many months	Number of Hours of Direct Instruction/Supervision

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# Reports Overview: NIH Biographical Sketch

- Pre-constructed report build by Digital Measures fitting the Biographical Sketch template for National Institute of Health (NIH) grant applications
- The Biographical Sketch is included in a grant application to provide information on the individuals who will be contributing to the project the grant would be funding
- Enter items on the Biographical Sketch screen, then Run the Biosketches under the Run Reports menu
- Upon selecting the Run Reports menu, you will see two versions of the NIH report, one of which is labeled “2015” and adheres to the new standards





# Reports Overview: NSF Biographical Sketch

- Pre-constructed report build by Digital Measures fitting the Biographical Sketch template for National Science Foundation (NSF) grant applications

Note: This report is intended to provide a solid starting point for your NSF Biographical Sketch, based on the data you are currently collecting in Activity Insight. Additional manual entries within this report may be necessary to fully comply with NSF reporting requirements.

Screen: *NIH (pre-2015) and NSF*  
Items: All records  
Criteria (is one of):  
1. *Biographical Sketch Type* contains the text "NSF" and *Personal Reference Number for this Biographical Sketch record* is equal to "*Biosketch reference number (parameter)*"  
2. *Biographical Sketch Type* contains the text "NSF" and "*Biosketch reference number (parameter)*" is equal to ""

## NSF BIOGRAPHICAL SKETCH

[Last Name], [First Name] [Initial of: [Building Where Your Office is [Your Organization]  
[Middle Name]] Located] [Office Room Number]  
E-mail: [E-Mail Address]

### Professional Preparation

Screen: *Education*  
Items: All records

Screen: *Post Graduate Training Residencies and Fellowships*  
Items: All records

[Institution]	[Field]	[[Level/Title] or [Explanation of "Other"]], [Start Year - End Year]
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[Institution]	[Emphasis/Major]	[[Degree] or [Explanation of "Other"]]
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### Appointments

Screen: *Academic, Government, Military and Professional Positions*  
Items: All records

[Title/Rank/Position], [Organization]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).





# Reports Overview: Standard CV

- You may submit this CV template as part of the evaluation process
- This was built to provide a uniform CV template
- Once your historical information is in Activity Insight, you only need to incrementally update the database with your most recent activity

[[Last Name], [First Name] [Initial of: [Middle Name]]]

**Personal Information**

Office: [[Office Phone Areacode]] [Office Phone Prefix]-[Office Phone Suffix]  
Dept: [[[Department Phone Areacode]]] [Department Phone Prefix]-[Department Phone Suffix]  
Fax: [[[Fax Areacode]]] [Fax Prefix]-[Fax Suffix]  
Email: [E-Mail Address]  
Home Address: [Home Address]  
Professional Mailing Address: [Professional Mailing Address]  
US Citizen: [U.S. Citizen or Permanent Resident?]

**Licensure**

Screen: Licensure  
Items: All records

[Title of Licensure], [Sponsoring Organization]  
Licensed to practice in: [list of [States in which you are licensed to practice] separated by ", "]  
Licensure Renewal Number: [Licensure Renewal Number]  
Initial date of license: [Month Obtained Day Obtained Year Obtained]  
Expiration Date: [Expiration Month Expiration Day, Expiration Year]

**Certification**

Screen: Certifications and Recertifications  
Items: All records

[Title of Certification] ([Type of Certification]), [Sponsoring Entity]  
Date of certification/recertification: [Original Month Obtained Certification Original Day Obtained Certification, Original Year Obtained Certification]  
Expiration Date: [Expiration Month Expiration Day, Expiration Year]

**Education**

Screen: Education  
Items: All records

[Institution]  
[Location of Institution]  
[[Degree] or [Explanation of "Other"]]

**Postgraduate Training**

Screen: Post Graduate Training Residencies and Fellowships  
Items: All records

[Institution]  
[[Level/Title] or [Explanation of "Other"]]

**Employment History**

Screen: Academic, Government, Military and Professional Positions  
Items: All records

[Title/Rank/Position], [Organization], ([Start Month Start Day, Start Year - End Month End Day, End Year]).

**Honors and Awards**

Screen: Awards and honors

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**Tips & Tricks**

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**Help**





# Tips & Tricks

- Here, we'll take a look at the following key features that streamline data entry and reporting:
  - Faculty/Staff Guide
  - Expanding Text Boxes
  - User Reference Fields
  - Dynamic Sub-Answers (DSAs)
  - Importing Citations from Other Systems
  - Pasteboard
  - Rapid Reports





# Tips & Tricks: Faculty/Staff Guide

- At the top of the Manage Your Activities screen, you'll see a note stating “Review a guide to manage your activities”
- This serves as an Activity Insight Overview, and will recap several of the concepts from this training resource

## Direct link

- <http://info.digitalmeasures.com/guide2>
- Use this as a quick reference guide

**Welcome!**

### ACTIVITY INSIGHT OVERVIEW

Activity Insight organizes and builds reports on teaching, research and service activities. It enables you to keep track of your activity information just once so that many outputs can be prepared, such as annual activity reports, promotion and tenure documents, accreditation reports, your CV, your profile on your campus website and more. It also assists your administration in responding to requests for faculty-related data, rather than needing to continually ask you for the information. This enables your campus to communicate more effectively about your accomplishments.

Activity Insight is designed to be easy to navigate. To help you get started, though, here is a quick overview of the utilities you will work with most often.

- Left-Hand Menu
- Manage Activities
- Run Reports

### TIPS AND FEATURES

Take a look at the following key features that streamline data entry and reporting!

- Expanding Text Boxes
- Import Citations from Other Systems
- PasteBoard
- Rapid Reports

### FAQS

- Does Activity Insight have spell check?
- How do I know where to put each of my different types of activities?





# Tips & Tricks: Text Boxes

- You may see small diagonal lines in the lower right-hand corner of text boxes
- Clicking down on these lines allows you to drag your cursor to expand and contract the size of a text box – providing you with more visible space when entering text

Brief Biography (30 Words or Fewer) Sample Faculty received her Bachelor's degree in Biology from the University of Virginia, where she graduated with honors. In 2005, she graduated with a degree in Medicine from the University of Wisconsin-Madison, where she

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# Tips & Tricks: User Reference Fields

- A user reference field is a search box of the user accounts that exist for the Morehouse School of Medicine
- User reference fields are used to associate records with user accounts; records with which a user has been associated are visible to that user

**Authors**  
Please order the authors in the order of authorship.  
Please either select a person from the drop-down list or enter their name in the input fields.

**1st Author**

People at Morehouse School of Medicine	First Name	Middle Name/Initial	Last Name	Institution/Company	If a student, what is his/her level?
Faculty, Sample: sample_faculty	<input type="text"/>				

Select the number of author rows to add:

- Collaborators can update the records to which he/she is associated; however, only the record's creator will be able to delete the record, or remove him/herself from the record if ownership should shift





# Tips & Tricks: Dynamic Sub-Answers

- A dynamic sub-answer (DSA) is a record within a record that enables you to associate more than one author to a specific publication
- You have the ability to select how many DSA rows to create at one time by selecting the number of rows you would like to enter from the drop-down list in the lower right hand corner of the DSA section
- You can also change the order in which records appear in a DSA by using the arrows to the right of each DSA record

**Authors**  
Please order the authors in the order of authorship.  
Please either select a person from the drop-down list or enter their name in the input fields.

1st Author					
People at Morehouse School of Medicine	First Name	Middle Name/Initial	Last Name	Institution/Company	If a student, what is his/her level?
Faculty, Sample: sample_faculty	<input type="text"/>				

2nd Author					
Gibbs, Alicia: agibbs	<input type="text"/>				

Select the number of author rows to add:





# Tips & Tricks: Pasteboard

- The pasteboard widget provides a convenient place to store “working content”, typically copy-and-pasted from another document or file
- Placing your “working content” in the pasteboard reduces the need to switch between multiple applications during data entry
- Once text is in the Pasteboard, pieces of that text may be highlighted, and then copied and pasted or dragged and dropped into the appropriate field above





# Tips & Tricks: Rapid Reports

- While you are managing your activities, you may want to see how a particular change looks on a report
- Rapid Reports provides you with quick and easy access to the reports you can run from Activity Insight

Welcome, Sample Faculty! ▾

**Manage Activities**

- Rapid Reports
- PasteBoard
- Run Reports
- Help

**Edit Personal Information**

Professional Mailing  
Office Room  
Department  
MSM  
U.S. Citizen or Permanent Resident?  
Brief Biography (30 Words or Fewer)

**Rapid Reports**

Select a report template, date range and file format, then run the report.

Report: Faculty Activity Report ▾

Start Date: Jan ▾ 01 ▾ 2016 ▾

End Date: Dec ▾ 31 ▾ 2016 ▾

File Format: Microsoft Word ▾

Note: Changes to Microsoft Word reports do not change data in the system.

Cancel Run Report





# Tips & Tricks: Importing Citations

- There is a good chance that citations of your publications are already stored in 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 allow you to pick records and then export them into a BibTeX file
- This feature enables you to upload that BibTeX file so that you do not need to re-key those citations





# Tips & Tricks: BibTeX Imports

## What is BibTeX?

- BibTeX is the most broadly supported standardized way to structure publication citations in a file
- This makes it easy to move citations between two software applications
- You export citations from one software application into a BibTeX file and then import that file into another software application
- In this case, you are exporting from another software application and importing into Activity Insight
- You can find instructions for how to export a BibTeX file and upload it to Activity Insight here:

<http://info.digitalmeasures.com/bibtexfiles.html>





# Tips & Tricks: PubMed Imports

- In addition to having the ability to import data via a BibTeX file, you are also able to pull your citations into Activity Insight directly from PubMed without first saving them to a BibTeX file
- PubMed is a resource provided by the US National Library of Medicine® that provides free access to MEDLINE®, the NLM® database of indexed citations and abstracts to medical, nursing, dental, veterinary, health care, and preclinical sciences journal articles
- For more information, see this link:  
<http://info.digitalmeasures.com/pubmed>





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# Help

- For assistance with Activity Insight, you're always welcome to review the Faculty Guide at the top of the Manage Activities screen
- Your Digital Measures administrator, Alicia Gibbs (agibbs@msm.edu), is also on hand to assist you with questions you might have about working in the system
- To submit a Help inquiry while working in Activity Insight, click “Help” on the left-hand menu; you can choose to send your inquiry to Alicia, or to Digital Measures

Welcome, Sample Faculty!

Manage Activities

Rapid Reports  
PasteBoard  
Run Reports  
Help

Get Help

Please complete the form below, providing as much detail as possible.

**Your Contact Information**

Name Sample Faculty

E-mail

I want to remain anonymous  
Note: If you need a response, do not select this option

**Your Question or Issue \***

**Who should receive this message?**

Your Digital Measures Administrator at Morehouse School of Medicine, Alicia Gibbs

Digital Measures

Cancel Send

