



5/1/2021

# A Faculty Guide To Activity Insight

*Specifically Designed for: College of Engineering*  
The Pennsylvania State University



For Activity Insight support email:  
[AI-Support@psu.edu](mailto:AI-Support@psu.edu)

**Activity Insight** is a web-based application that is meant to be a one stop shop for faculty in creating your Curriculum Vitae, Biosketch, Faculty Activity Report, University Dossier, Non-Tenure Track Faculty Promotion Dossier, any accreditation reports, and/or Faculty Web Profiles. This guide will describe how and where to enter information into Activity Insight.

## Logging In

To access Activity Insight for Penn State, use your Internet Browser and go to:

<https://www.digitalmeasures.com/login/psu/faculty>

Mozilla Firefox, Google Chrome, and Safari are all supported browsers for this website.

You will sign into the program using your Penn State WebAccess credentials. However, we do recommend that you create your bookmark or favorite manually with the above URL, clicking on favorite or bookmark after you login can result in a future login error. You can also login from the support page: <https://activityinsight.psu.edu>

After logging into Activity Insight, you will be on the *Activities screen*. From this “Main Menu” you are able to access the various links in order to enter information about yourself in the various screens that are available in the program. The sections and screens follow the University Dossier divider pages.

## Overview

To access a screen, click the name or link, it will then take you to the “Summary screen”. Once on the “Summary screen”, you will see the list of records that have already been entered into the system. There are three possible actions you can take, depending on the screen you are in:

- To **add** a new record, click on button that says + Add New Item.
- To **delete** a record, select the check box on the far-right side of the record, and then select the Trash Can button. You will be prompted with a pop-up window verifying you want to delete the selected record.
- To copy or **duplicate** a record where you can make modifications, select the check box on the far-right side of the record, and then select the Duplicate button. (You cannot copy from one screen to another with this feature.)

## Read Only Fields

Read Only Fields are marked with a lock icon. To change the information in these fields, contact the Activity Insight Administrator for your group or the “AI” Administrators.

## Date Fields

You must enter at least on date (such as a start or end year) for accurate reporting. You cannot save a record without entering at least the year in the date field

- Entering a start date without an end date means the activity is ongoing to the present time.
- Entering an end date without a start date means the activity only took place on that day or year.

## 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 when finished. 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. If you do not enter a date field on this screen you will also receive a warning message.

## **\*\*Most Important Rule\*\***

NO screens or fields in Activity Insight are MANDATORY. You should only enter information INTO Activity Insight that you need or want to appear on your report/s. Some screens do have required fields that are marked with a red asterisk.

# Screens Available for the College of Engineering

## General Information

### Personal and Contact Information

- Update fields in this screen as appropriate.
- Data from this screen appears in the College of Engineering SRA and the University Dossier.

### Administrative Data – Permanent Data

- Update fields in this screen as appropriate.
- Permanent Data includes start of appointment, date of tenure decision, etc.
- Some faculty may have data in these fields already, but if you do not, please enter this information as best you can. You can contact the Office of Human Resources (OHR) for specific dates if necessary.

### Administrative Data – Yearly Data

- Update fields in this screen as appropriate.
- Includes department affiliation, faculty rank, graduate faculty status, leave status, etc.
- You may have restricted access to some fields on this screen, if you need a field modified that you cannot modify, please contact your College's Administrator or the Activity Insight Administrators ([AI-Support@psu.edu](mailto:AI-Support@psu.edu)).
- **Important Fields:**
  - Exact Rank and Title
  - Faculty/Staff Rank
  - On Leave? – fill this information if you are on Sabbatical or an unpaid leave.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Education

- Enter in your degree information for each of your degrees.
- **Important Fields:**
  - Degree (if Other is selected make sure an Explanation of "Other" is filled out)
  - Is this an honorary degree?
  - Institution
  - Emphasis/Major
  - Supporting Areas of Emphasis
  - Highest Degree You Have Earned? (this is a required field)
  - Start and/or Issued Date
- Data on this screen appears in the University Dossier.

## Licensures and Certifications

- Enter any licenses or certifications you may have in this screen.
- **Important Fields:**
  - Name of Licensure/Certification
  - Name of Organization
  - Date Obtained
- Data on this screen appears in the University Dossier.

## Academic, Government, Military and Professional Positions

- You may fill out as much information as you deem appropriate on this screen.
- The University Dossier is designed to exclude current activities performed while at Penn State.
- **Important Fields:**
  - Experience Type
  - Organization
  - Title/Rank/Position
  - Start and End Dates
- Data from this screen appears on the University Dossier.

## Administrative Assignments

- Enter your college, departmental, and University Administrative assignments.
- **Important Fields:**
  - Position/Role (if Other is selected make sure an Explanation of Other is filled out)
  - Scope
  - Campus/Center/College/Department/Institute/Program/School/University
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Honors and Awards

- Enter any honors or awards for leadership, teaching, scholarship or service recognition here.
- This section is broken out by “Purpose”; for example, if *Teaching or Advising* is selected then it will appear in the Scholarship of Teaching and Learning section of the University Dossier.
- **Important Fields:**
  - Award or Honor Name
  - Organization/Sponsor
  - Purpose (**very important**)
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Professional Development

- Enter seminars (including web-based), retreats, roundtables, workshops, etc. with the purpose of knowledge acquisition rather than knowledge dissemination, i.e., does not include conference presentations, conference presenter, etc., as those are listed under the “Research” section.
- What you select for “Choose one” will determine where the data will appear in the Dossier; for example, if *Teaching* is selected it will appear in the Scholarship of Teaching and Learning section of the Dossier.
- **Important Fields**
  - Activity Type (if you choose Other, you must fill out the Explanation of “Other” below)
  - Title of Seminar/Workshop
  - Seminar/Workshop presented by
  - Scope
  - Choose One – Teaching, Research or Service
  - Start and End Dates
- Data on this screen appears in the University Dossier.

## Narrative Statement screens (Annual Review, Non Tenure Track Faculty Promotion Review, P&T Review, or Post-Tenure Review)

- Each narrative statement screen has an open text area for you to describe your activities over the last year.
- Although there is a suggested word limit (giving you an indication of the preferred length of the statement) you will be able to write many more words than suggested. You may copy and paste from the pasteboard or from a Microsoft Word document into this field.
- It is very important that you include a Start or End Date on this screen for it to appear correct in the report.

## Teaching and Learning

### Lists of Credit Courses Taught

- This data is added to Activity Insight by the Activity Insight Administrators the Monday after Commencement. You should check this screen for accuracy and for the possibility of missing data. To avoid entering duplicate information, please, do not enter information into this screen without first checking with the University’s Activity Insight Administrators.

- You may store a course syllabus and a peer review on this screen. The syllabus and peer review will not print out with your FAR or University Dossier. You will need to run the *Attachments and Supplemental Materials* report separately for this data.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Non-Credit Instruction Taught

- Enter courses and workshops taught in support of outreach-based instruction, including continuing and distance education, service-learning courses, cooperative extension programs, and instructional activities that are not for credit.
- **Important Fields:**
  - Semester
  - Instruction Type (if Other is selected make sure an Explanation of “Other” is filled out)
  - Role
  - Delivery Mode
  - Start and End Dates
- Data on this screen appears in the University Dossier.

### SRTE and Teaching Evaluations

- This information is transferred directly to the Activity Insight system via web services from the Schreyer Institute for Teaching Excellence as soon as it is available.
- This screen is a read only screen, if information is incorrect contact the Activity Insight Administrators (AI-Support@psu.edu).
- You can store supplementary document, add peer reviews, and/or SRTE comment summaries. Documents will not appear within reports. To print a list of all supplementary documents, run an *Attachment and Supplemental Materials* report.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Alternate Assessment of Teaching Effectiveness

- This is new as of Fall 2020 and was added per the Vice Provost for Faculty Affairs.
- For assistance with filling out this form see the “Guidance on the Assessment of Teaching Effectiveness” document found on the Office of the Vice Provost for Faculty Affairs website. (<https://www.vpfa.psu.edu/>)
- The box below Good Faith Effort and Alternate Assessment in ONLY for the Annual Review reports.
- Everything under Alternate Assessments (for Promotion and Tenure Reviews Only) will appear in the University Dossier report and the Non-Tenure Track Faculty Promotion Dossier.

### Academic Advising

- Use this screen to enter the total number of students you have advised for the semester or year.
- **Important Fields:**
  - Term and Year
  - Number of Undergraduate, Graduate, and Honor Students
- You can add multiple Honor Students Advised by using the +Add Row or Actions button. You can move them by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the top right corner of the box. If you want to delete a Course, click on the Actions button.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Course Related Instructional Activities

- You may enter a narrative about instructional activities that are related to any course you have taught.
- **Important Fields:**
  - Term and Year
  - Course Information
- You can add multiple Courses by using the +Add Row or Actions button. You can move them by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the top right corner of the box. If you want to delete a Course, click on the Actions button.
- Data from this screen appears on the College of Engineering SRA and the University Dossier.

## Other Evidence of Teaching/Advising

- On this screen, you may enter additional evidence of teaching and/or advising. This includes Participation in Advising Programs to New Students. Presentations on Advising to New Students, Service on Advising Committees, Awards won by Students advised, etc.
- **Important Fields:**
  - Involvement Type (if Other is selected make sure an Explanation of “Other” is filled out)
  - Role
  - Delivery Mode
  - Number of Participants
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Student Mentorship and Supervision

- Supervision of graduate and undergraduate dissertations, theses, projects, monographs, performances, productions, and exhibitions required for degrees; types of degrees and years granted; membership on graduate degree candidates' committees will go here.
- **Important Fields:**
  - Involvement Type (if Other is selected make sure an Explanation of “Other” is filled out)
  - Degree (if Other is selected make sure an Explanation of “Other” is filled out)
  - Title of Student’s Work
  - Stage of Completion
  - Student Information
  - Start and End Dates
- You can add multiple Students by using the +Add Row or Actions button. You can move them by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the top right corner of the box. If you want to delete a Student, use the Actions button.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Research and Creative Accomplishments

### Publications

- You can manually enter, use ‘pasteboard’ or import information about your publications.
- You can choose to import items by uploading BibTex files from any of the following reference managers: EndNote, Google Scholar, Mendeley, RefWorks, HeinOnline and/or Zotero. Please see <https://www.digitalmeasures.com/activity-insight/docs/directdataimports/> for more detailed information.
- You can also import directly items from Scopus, Web of Science, CrossRef, ORCID and PubMed.
  - Training information for both Publication imports is found at [activityinsight.psu.edu](http://activityinsight.psu.edu) under the Training tab.
- **Important Fields:**
  - Contribution Type -a required field (if Other is selected make sure an Explanation of “Other” is filled out)
  - Current Status
  - Title of Contribution – use this field to enter titles of articles, books, book chapters, book reviews, encyclopedia entries, journal articles, etc.
  - Journal/Periodical Title – use this field to enter ONLY Journals/Periodical titles.
  - Published in – use this field to enter titles of larger work when the “Title of Contribution” field has information
  - Was this peer-reviewed/refereed?
  - Author Information (specifically, indicate the Author Role for you)
  - The correct date fields associated with the Current Status of the publication

- You can add multiple Authors by using the +Add Row or Actions button. You can move authors into any position by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the upper right corner of the box. If you want to delete an Author, use the Actions button.
- You can add a Post Print Publication file here. Per the **Open Access Policy (AC02, <https://policy.psu.edu/policies/ac02>)**, if this is a journal article, please upload a copy of the post-print (**not** the final published version of the article). The University Libraries will make it accessible to the **public** through ScholarSphere (<https://scholarsphere.psu.edu/>) according to the default terms of the journal's publishing agreement. If you would like to get a waiver of the policy for this article, please go here: <https://openaccess.psu.edu/waiver/>.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Report to Sponsor

- Reports that are sent to your sponsor should be entered here.
- **Important Fields:**
  - Report Title
  - Report Period (if Other is selected make sure an Explanation of "Other" is filled out)
  - Date Reported
  - Sponsor Name
  - Authors
- You can add multiple Authors by using the +Add Row or Actions button. You can move authors into any position by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the upper right corner of the box. If you want to delete an Author, use the Actions button.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Papers, Presentations, Seminars, Workshops

- Enter any papers, presentations, seminars, and workshops where you were the presenter, the author, or you contributed to.
- **Important Fields:**
  - Conference/Meeting Name
  - Sponsoring Organization
  - Conference/Meeting Location (this should be the physical location of the event)
  - Presentation Title
  - Presentation Type (if Other is selected make sure an Explanation of "Other" is filled out)
  - Start and End Dates
  - Presenters/Authors
  - Invited, Accepted, or Contributed?
- You can add multiple Presenters/Authors by using the +Add Row or Actions button. You can move them into any position by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the top right corner of the box. If you want to delete a Presenters/Authors, use the Actions button.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Outreach – Editorial Responsibilities

- **Important Fields:**
  - Title of Journal/Book Series
  - Editor Role (if Other is selected make sure an Explanation of "Other" is filled out)
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Outreach – Peer Review of Grant Proposals

- **Important Fields:**
  - Funding Agency

- Agency Program
- Type of Reviewer (if Other is selected make sure an Explanation of “Other” is filled out)
- Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Outreach – Peer Review of Manuscripts, etc.

- In many cases Peer Reviewing is Confidential and Anonymous, in that case you can skip entering the Title of Article
- Important Fields:
  - Title of Journal, Book, or other Publication Type
  - Your Role (if Other is selected make sure an Explanation of “Other” is filled out)
  - Number of Reviews Completed for this Journal, Book, or other Publication Type
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Outreach – Other Use of Expertise

- On this screen you want to enter Award Juries, External Tenure Review, Government Agencies, Interviews, Invited testimony, Lectures and Courses Taught at Other Colleges & Universities, Professional Industries, Radio Commentary, Speaking Engagements, or Other.
- Important Fields:
  - Role
  - Type of Work (if Other is selected make sure an Explanation of “Other” is filled out)
  - Title of Work or Activity
  - Interviewed By
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Consulting

- Record consulting activities such as those identified by policy AC80 Outside Business Activities and Private Consulting (<https://policy.psu.edu/policies/ac80>).
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Contracts, Grants, Fellowships and Sponsored Research

- This data is imported from the Office of Sponsored Programs (SIMMS or MyResearch Portal) the Second Monday of each month. Faculty members should review the information in this section, if an application for internal or external funding has been made and it does not go through the Office of Sponsored Programs then this data should be entered here. If you enter data in Activity Insight that is in MyResearch Portal you are at risk of having a duplicate record imported. Contact the Activity Insight Administrators ([AI-Support@psu.edu](mailto:AI-Support@psu.edu)) if you have questions.
- Important Fields:
  - OSP Number (if available)
  - Funding Type
  - Contract/Grant/Research Title
  - Sponsoring Organization
  - Sponsor Type (if Other is selected make sure an Explanation of “Other” is filled out)
  - Does research support improvement of instruction (YES or NO)
  - Current Status
  - Total Requested, Total Anticipated Award, and/or Award Amount
  - Date fields correspond with Current Status
    - If Pending, Date Submitted for Funding should be entered
    - If Not Funded, Date Not Funded should be entered



- If Awarded, Date Funding Awarded, Start Date of Funding and End Date of Funding should be entered
  - Amendments
  - Investigator (be sure to add YOUR Role and %Assignment)
- You can add multiple Amendments or Investigators by using the +Add Row or Actions button. You can move them into any position by clicking on the 6 dots on the left and dragging the box, or by using the Actions button in the top right corner of the box. If you want to delete an Amendment or Investigator, use the Actions button.
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Patent Intellectual Property

- You will enter your patented and patent-pending intellectual properties here.
- **Important Fields:**
  - Patent or Patent Application
  - Patent Type
  - Patent Title
  - Patent or Patent Application Number
  - As many of the date fields as possible
  - Inventors
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Publication Impact – Citations

- This screen can be used to enter Citation Counts for Publications as well as H-Index values.
- **Important Fields:**
  - Title of Publication/Article Cited
  - Number of Citations
  - Date of Citation Count
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Impact in Society of Research Scholarship and Creative Accomplishments/Media Mentions

- List evidence of impact in society of research scholarship and creative accomplishments, such as interviews, media mentions, television appearances, etc. Note that **citations** of your articles and books should be entered in the 'Publication Impact - Citations' screen.
- **Important Fields:**
  - Type of Publicity (if Other is selected make sure an Explanation of “Other” is filled out)
  - Title/Description
  - Medium (if Other is selected make sure an Explanation of “Other” is filled out)
  - Date
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Pursuit of Advanced Degree and/or Further Academic Studies

- On this screen, enter academic studies, continuing education, or advanced degrees that have been completed or are in progress.
- **Important Fields:**
  - Discipline
  - Type (if Other is selected make sure an Explanation of “Other” is filled out)
  - Degree (if Other is selected make sure an Explanation of “Other” is filled out)
  - Status
  - Started Date and Issued Date
  - Awarded by
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Professional Memberships

- Important Fields:
  - Name of Organization
  - Leadership Position Held
  - Scope of Organization
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## New Course or Program Development

- Important Fields:
  - Type
  - Title
  - Course Prefix and Course Number
  - Developers
  - Date Developed
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## New Software Programs Developed

- Important Fields:
  - Name of Software Product
  - Faculty/Developers
  - Date
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## New Method of Teaching Established Course/Program

- Use this screen to record significant new methods you have developed for teaching established courses, such as developing an online version of an existing course.
- Important Fields:
  - Type
  - Title
  - Course Prefix and Course Number (this should be an already created course)
  - Developers
  - Date Developed (date the new method was created)
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Application of Research Scholarship

- Indicate new applications developed, tested, used, applied, investigated, etc.; new or enhanced systems and procedures demonstrated or evaluated for government agencies, professional and industrial associations, educational institutions, etc.
- Important Fields:
  - Product Name
  - Developers/Inventors
  - Status of Development
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

## Technology Transferred/Adapted in the Field

- Faculty should include in-progress and completed transfers of technology transferred or adopted in this screen.
- Important Fields:
  - Title of Technology
  - Transferred to/Adopted by

- Developers/Inventors
- Status of the Transfer
- Date Transferred
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Technical Assistance Provided

- This screen should be used to record all technical assistance that was provided.
- **Important Fields:**
  - Assistance Provided to
  - Address
  - Number of Hours of Assistance
  - Description of Assistance
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### Service

#### Internal to PSU

- List elected and/or appointed Administrative Support, Assurances to Student Organizations, Committee Work, Contribution to Programs to Enhance Equal Opportunity/Cultural Diversity, Organizing Conferences and Service on Conference Committees, Participation in Development Activities, Participation in Governance Bodies and Related Activities, and Participaion in Recuritment and Retention Activities at the Campus, College, Department, Division, School, or University levels.
- **Important Fields:**
  - Area of Service
  - Service Type (if Other is selected make sure an Explanation of "Other" is filled out)
  - Position/Role (if Other is selected make sure an Explanation of "Other" is filled out)
  - Title of Service
  - Organization
  - Committee Name
  - Were you elected or appointed?
  - Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

#### External to PSU

- List elected and/or appointed Administrative Support, External Evaluator for Promotion and/or Tenure, External Examiner, Organizeing Conferences and Service on Conference Committee, Participation in or Service to Professional and Learned Societies, Participation in Community Affairs, Service through Educational Programs offered by Media, Service to Business and Industry, Service to Citizen and/or Client Groups, Service to Governmental Agencies, Service to Public and Private Organizations, Testifying as an Expert Witness, Voluntary Consultation and/or Advising at the Society or Profession levels.
- **Important Fields:**
  - Area of Service
  - Service Type (if Other is selected make sure an Explanation of "Other" is filled out)
  - Position/Role (if Other is selected make sure an Explanation of "Other" is filled out)
  - Title of Service
  - Organization/Committee/Club
  - Subcommittee
  - Were you elected or appointed?

- Start and End Dates
- Data on this screen appears in the College of Engineering SRA and the University Dossier.

### **Biographical Sketches**

- Use these screens to build your Biographical Sketch Reports for NIH or NSF

NIH (2015)

NSF (and NIH pre-2015)

NSF Current and Pending Support

## Running Reports

There are two ways to run a report.

### Rapid Reports:

- Rapid Reports allows you to select any of the preconfigured reports from any screen or record. This will help you check to make sure your records are going into the correct location of the report.

### Rapid Reports

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

Report:

Start Date:

End Date:

File Format:

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

### Run Reports:

- Run Reports will take you to a screen where you select the preconfigured report, like above, but you will have more Report Style options to choose from.

### Run Reports

1 Report:   
[Download this report's template](#)

2 Date Range: Start Date     
End Date

3 Report Options:

- a) Citation Style:
- b) Choose Narrative Statement to Include:
- c) Include Works In Progress?:
- d) Include Contracts, Grants, and Sponsored Research that were Not Funded?:

4 File Format: File Format   
Changes made to the Microsoft Word document **will not** be reflected in the system.  
Page Size

## Help

Completing this form will open a helpdesk ticket with either the Penn State University Administrators or Digital Measures. Please note that questions or comments about the system (i.e. where to enter information, records missing or incorrect, general questions or comments) should be directed in the first instance to the administrator for your college/school/division/department. If you do not know who that is select the Penn State University Administrators below. System errors (i.e. a page cannot be displayed, performance issues such as system slowness) may be directed to Digital Measures.

### Get Help



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

#### Your Contact Information

Name Penn State 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 Penn State, Penn State University Administrators  
 Digital Measures

Cancel

Send