

# Digital Measures

## Faculty User Manual



# Digital Measures Faculty User Manual

INFORMATION AND TRAINING SESSION

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## **WELCOME TO ACTIVITY INSIGHT!**

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Digital Measures' Activity Insight is a fully customizable online information management system designed to organize and report on your teaching, research, and service activities. It provides the most reliable, versatile, and secure solution for generating custom reports easily and in real time.

It enables you to keep track of your activity information just once so that many outputs can be prepared, such as faculty annual reports, promotion and tenure documents, accreditation reports, your CV in UM format, and more.

Activity Insight is SaaS (Software as a Service) solution conveniently accessible from any device

## **BENEFITS TO USERS**

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Activity Insight eliminates periodic, recurring requests for information on your activities and accomplishments. Faculty can also generate up-to-date CVs as well as annual reports. The web-based interface is easy to use and intuitive.

Faculty members will have two menu items: Manage Your Activities and Run Custom Reports. Once all information is entered, faculty can run reports on their own activities.

## **BENEFITS TO UNIVERSITY ADMINISTRATORS**

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University administrators need timely access to faculty activity reports for accreditation; state institutional research surveys; personnel review procedures, such as promotion and tenure; program reviews; and other stakeholders. Activity Insight gives university administrators an efficient, centralized, easy-to-navigate source for generating reports on these data. Activity Insight provides a view of faculty activities to be better positioned to publicize their accomplishments because of this awareness.

# ACCESSING DIGITAL MEASURES

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## Logging In to Activity Insight

Activity Insight has been programmed with the University's Single Sign-on system to automate the process of authentication using your UM User ID and password.

You can access Activity Insight using the following URL:

<https://miami.edu/digitalmeasures>

**UM Single Sign-On**

**You have been logged out successfully.**  
To complete the log off process and prevent other users from accessing your account, you must **close** all browser windows and **exit** the browser application.

**CaneID**  
  
Forgot your CaneID?

**Password**  
  
Forgot your Password?

**Your CaneID Account**  
[Change Your Password](#)  
[Change Your Security Question](#)

**Help Topics**  
[Help with CaneID](#)

**Sign in**

For security reasons, log out of UM Single Sign-On and quit your web browser when you are done accessing service that require CaneID authentication.

Be wary of any program or web page that asks you for your username and password. Secure University of Miami web pages that ask you for your username and password will generally have URLs that begin with "https://caneid.miami.edu" or "https://caneidhelp.miami.edu". In addition, your browser should visually indicate that you are accessing a secure page.

# NAVIGATING DIGITAL MEASURES

Welcome, [Name] Log Off Search All Activities...

Setup [INCOMPLETE]  
Dashboard  
**Manage Activities**  
Rapid Reports  
PasteBoard  
Manage Data  
Run Reports  
Usage Statistics  
Users and Security  
Resource Center  
Help

[Review a guide](#) to manage your activities.

Before exiting the system please confirm that your information is up to date.

▼ **Confirmation**  
Confirmation Page

▼ **General Information**  
Personal and Contact Information  
Administrative Data - Permanent Data | Yearly Data  
Work History  
Administrative Assignments  
Awards and Honors  
Consulting  
Education - Degrees Earned  
Post Graduate Training and Fellowship Appointments  
External Connections and Partnerships  
Faculty Development  
Licensures and Certifications  
Media Appearances and Interviews  
Professional and Honorary Organizations  
Workload Information

▼ **Teaching**  
Academic Advising  
Directed Student Learning (e.g., theses, dissertations)  
Other Professional Teaching Activities  
Scheduled Teaching

▼ **Scholarship/Research**  
Artistic and Professional Performances and Exhibits  
Contracts, Grants and Sponsored Research  
Publications  
Biographical Sketch - NIH | NSF  
Copyrights and Patents  
Presentations  
Research Activity

▼ **Service**  
University Service  
Professional Activities  
Community Activity

UNIVERSITY OF MIAMI  
POWERED BY DigitalMeasures  
Privacy Policy

Digital Measures is divided into multiple sections:

- **Confirmation:** In the Confirmation Page you will enter the date of the last the last revision made on your CV.
- **General Information:** Information about your employment at UM, past employment, education, memberships, collaborations, certifications and more.
- **Teaching:** Your interactions with students through academic advising, mentoring/directed student learning, non-credit and for credit/scheduled teaching assignments , other professiaonl teaching activities.
- **Scholarship/Research:** Your Artisitc and Professional Performances and Exhibitions, Contracts, Grants and Sponsored Research, Publications,

Biographical Sketch-NIH,NSF, Copyrights/Patents, Presentations and Research Activity.

- **Service:** University Service, Professional and Community Activities

Data for some of these sections are obtained from other campus information resources (CaneLink, Workday). For instance, scheduled teaching data are automatically imported into Digital Measures every semester. Data fields are typically locked to ensure correspondence with authoritative systems. Locked data can be edited by having the information updated within the system of record.

Publication data can be entered rapidly through guided imports from other reference databases (PubMed, Google Scholar, Web of Science??, etc.).

Information for some of these sections is collected from campus resources (Workday) and are locked to ensure information matches the information found in the authoritative systems. Locked data can only be edited by having the information updated in the system of record.

## LEFT-HAND MENU

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The left-hand menu is on all Activity Insight screens and contains the basic navigation links. The main buttons will provide the following functionality:

Note: You may not have all utilities displayed or functionality described here. The Left-Hand Menu is dependent upon the permissions assigned to your Activity Insight security role.

- **Manage Activities:** Enter or manage your own teaching, research, and service activities.
- **Manage Data:** Enter or manage other faculty's teaching, research, and service activities. (Deans, Assistant Deans, Department Chairs, etc.)
- **Run Reports:** Run customized reports based on the information entered into Activity Insight. Those with higher level permissions will be able to 'Create a new report' and choose from information available.
- **Help:** When faculty have a problem using Activity Insight, they can send a support request using the "Help" menu option. By default, users can choose to send their inquiries to their Activity Insight University Administrator but have the option to send directly to Digital Measures. Please send your request to the University Administrator and someone on campus will contact you.

## MANAGE ACTIVITIES


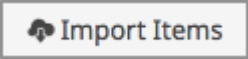



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### Overview:

The Manage Activities module allows faculty to capture and manage teaching, research/creative activities, and service accomplishments.

The first line of the text at the top of the Manage Activities page- Review a guide to manage your activities- provides a link to a universal Faculty Guide that is maintained by the vendor, Digital Measures. Most of that material is included and customized in this document. The Manage Activities page includes links to each of the data collection screens in your system.

When you first visit this page, it would be good to spend a few minutes looking through the screens accessible from it. To access a screen, click its name. The resulting summary screen displays records that are stored for that screen. There are six possible actions you can take from the resulting screen, although not all of these actions will always be available:

- To add a new record, select the  button.
- To import items in bulk, select the  button (available only for the Intellectual Contributions screen).
- To delete a record, select the appropriate check box, then select the  button.
- To edit or view a record, click anywhere in the record row on the summary screen.  
*Note: Your Digital Measures Administrator may have added records to the system for you. These records can be viewed, but cannot be edited or deleted. A  icon identifies these records. If revisions are needed to the records which have been entered on your behalf, contact your Digital Measures Administrator using the **Help** link.*
- To copy a record, select the appropriate check box, then select the  button.

### ***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 the 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.

### ***Duplicating an Item***

In some cases where there are two items that are almost identical, you may find it necessary to duplicate one and then slightly modify it. You can do this when viewing the items list for a particular section. First, click on the checkmark box for the item you wish to duplicate, then click on the Duplicate button.

### ***Removing an Item***

Click on the checkmark box for the item you wish to remove, and then click on the “Trash” button.

### ***Faculty Delegates***

Faculty can assign other individuals as one-to-one delegates in Digital Measures AI. Individuals assigned by faculty as one-to-one faculty delegates will have access to manage data and run reports for the faculty. To assign a delegate for your data and reports, please request delegate access at [mwilkinson@miami.edu](mailto:mwilkinson@miami.edu) (AI System Administrators).

### ***Keyword Search***

The Search function is always available at the top of all Activity Insight screens. This is a Keyword Search, which means it will find all activities/items that contain that word in any field. You can use the search to quickly find items when unsure of which section that may be in.

### ***Rapid Reports***

Rapid Reports, under Manage Activities in the Navigation Menu, provides easy access to run reports, such as your CV and Annual Report. Reports can be produced in different formats (MS Word, Adobe PDF, or Web HTML).

## **GENERAL INFORMATION SCREEN**

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*General Information: Information about employment at UM, past employment, education, memberships, collaborations, certifications, and more.*



## Personal and Contact Information

Basic personal and contact information has been pre-populated with information imported from Workday. Address information has been left intentionally blank to provide faculty the option of entering home or work address.



The text displayed with a Lock  First Name cannot be changed.

Fields with text boxes where information can be updated will display as follows:


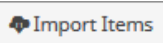

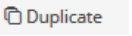
Address Line 1

Address Line 2

City

Once the desired information has been updated, make sure to click on the “Save” button   on the top, right hand side of the screen. Otherwise, the information will not be updated and saved.

There are six possible actions you can take from the resulting screen, although not all of these actions will always be available:

- To add a new record, select the  button.
- To import items in bulk, select the  button (available only for the Intellectual Contributions screen).
- To delete a record, select the appropriate check box, and then select the  button.
- To copy an existing record, check the box to the right of the name and select the  button.

Note: For records that you can view but not edit or delete, these have been added to the system for you and have been set by the System Administrator as restricted. If such records need revision, contact Mitzi Wilkinson, Medical Faculty Affairs.

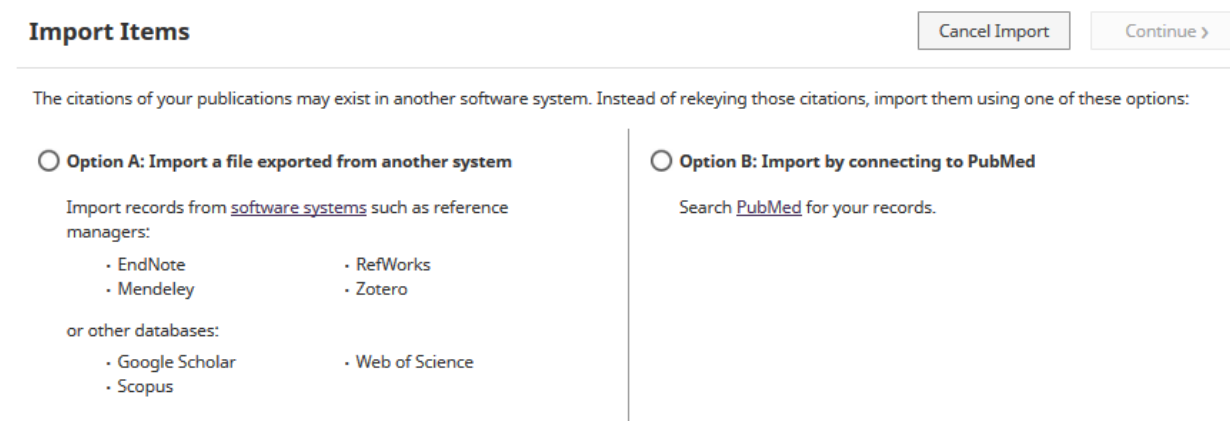
## Publications – Import Items

Faculty can now use an import feature to bring their data into Activity Insights easily. There is a good chance that citations of faculty 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 enable you to pick records and then export them into a BibTeX file.

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.

This feature enables you to upload an exported BibTeX file so that you do not need to rekey those citations.



Note: PubMed Imports is an additional major feature for importing citations for users. Faculty can now pull their citations into Activity Insight directly from PubMed without first saving them into a BibTeX file.

Click on Manage Activities from the left menu. Find the Intellectual Contributions under the Scholarship/Research heading. From there, you can click the Import Items button.

You can also edit data by clicking on the pencil icon associated with the listing.

## Run Reports

Run Reports is a template-based reporting utility that eliminates the need of creating reports by automating the process. The Run Reports screen contains four steps in the process of creating a report.

To run a report, select Run Reports in the Navigation Menu

Step 1.

Once on the Run Reports screen, select the report you wish to run from the drop-down list, e.g. “UM CV”

1 Report

UM CV

- Birthday Report by Month
- Contracts, Grants and Sponsored Research by Faculty
- Creative Works by Faculty
- Editorial and Review Activities by Faculty
- Faculty/Staff Directory
- General Service by Faculty
- Intellectual Contributions by Faculty
- LCME Table 4.2-1 Scholarly Productivity
- NIH Biographical Sketch
- NSF Biographical Sketch
- Presentations by Faculty
- Scheduled Teaching by Faculty

UM CV

- To download a report template that shows how the report you selected is built, click “Download this report’s template”. This is helpful if information is missing from your report. The details of how the report is built will show what fields are included in the report and give ideas on where to find the area with no data.

1 Report

UM CV

[Download this report's template](#)

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2 Date Range

Start Date Jan 01 2016

End Date Dec 31 2016

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3 Whom to Include

Users Selected by All [Change Selection](#)

Include These Accounts Enabled Only

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4 File Format

File Format Microsoft Word (.doc)

Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size Letter

## Step 2.

2 Date Range

Start Date Jun 01 1972

End Date Dec 31 2016

2. Select the date range for the information you wish to include in your report. Activity Insight will warn you if you attempt to create a report with an end date before the report's start date.
3. Activity Insight's default behavior is to include all enabled user accounts in a report. Faculty will only have access to their data.

Department Chairs, Deans, Assistant Deans, etc. will have the option of selecting who to include in the report. If you would like to limit your report to include only selected users, select [Click here](#) in Step 3 to open the Select who to include page in a pop-up window. If colleges, departments, and individual users are selected, these selections function as "and" options and the report will include all selections made. Activity Insight uses the user attributes – college, department, etc. – in users' most recent Yearly Data records, including records in the future, to determine who should be included.

- Warning: Changing the data in a report does not change the data inside Activity Insight. Use Manage Your Activities or Manage Data to make these changes.
  - Select the headings to show or hide the groups and then select the ones you want to include in your report.
  - Select all next to a heading to select all items under it. Select none next to a heading to clear all items under it.
  - When you have completed your selections, select Save at the bottom of the page to save your selections and return to the Create a Report page.
4. The Create a Report page will show the individuals you selected to include in your report under Step 3. You can also select to include enabled, disabled, or both enabled and disabled users in your report as part of this step.
  5. Select the file format for your report from the drop-down list in Step 4.
  6. The default options are Microsoft Word, Adobe PDF, and HTML. Digital Measures can make some reports available in Microsoft Excel. You should specifically state this in the Report Setup or Report Revision(s) work request if you need this additional format option.
  7. Select the paper size from the drop-down list in Step 5. Activity Insight supports US Letter and A4 sizes.

8. Review your selections and select Build Report. Activity Insight will build your report and prompt you to either open it or save it locally.

## **Logoff**

Logoff will log you off of Activity Insight. You will have to authenticate again to begin a new Activity Insight session. Sessions automatically time out after 90 minutes of inactivity. Note that users will receive a warning prompt five minutes before their session times out, which will enable them to restore their session if it should remain active.

## **Digital Measures Support**

If you have any questions or comments about the system (i.e. where to enter information, records missing or incorrect, general questions or comments) please contact the Office of Faculty Affairs at 305-243-6551 or via email:

Amanda Mesa, [amesa@med.miami.edu](mailto:amesa@med.miami.edu)

Isette Hernandez, [isetteh@med.miami.edu](mailto:isetteh@med.miami.edu)

Mitzi Wilkinson, [mwilkinson@med.miami.edu](mailto:mwilkinson@med.miami.edu)