

# ACTIVITY INSIGHT/FACULTY SUCCESS

## FREQUENTLY ASKED QUESTIONS



**WASHINGTON STATE**  
UNIVERSITY



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## 1. What is Activity Insight?

Activity Insight offers two main services:

1. Standardizing and streamlining the process for faculty to input information on their achievements.
2. Allowing Deans and Chairs to review and analyze the standardized data.

Deans may require faculty in the college to use Activity Insight for their Annual Reviews. Faculty enter their relevant information and can run an Annual Report which includes selected items for the Annual Review process.

## 2. What can I do if I cannot log in?

Activity Insight uses your WSU network ID to log in. First, ensure that you are using the correct username and password. Sometimes, a simple typo can cause login issues. Also, try logging in from another browser.

Second, confirm that you are using the correct link. Try this link to log in: <http://ai.provost.wsu.edu/>

Also note that you may not have access to Activity Insight. Accounts are granted for active faculty who have salaried positions.. Workday data on positions are used to generate accounts. If you are faculty and have issues logging in, you can submit a Digital Measures Service Desk ticket, and we (at WSU's Office of Institutional Research) can troubleshoot the issue. To submit a ticket, go to:

<https://jira.esg.wsu.edu/servicedesk/customer/portal/44/>

## 3. Can I carry over Activity Insight/Faculty Success information from a previous institution?

Yes, you can populate your WSU Activity Insight profile (in part) using information from a previous institution that also used Activity Insight/Faculty Success (from Watermark). Submit a Desk ticket with your name, and the name and department of your previous institution, to:

<https://jira.esg.wsu.edu/servicedesk/customer/portal/44/>

#### 4. What do I do once I enter my information?

Once you have entered and saved your information, you do not need to do anything else at that point. Typically, department chairs run reports on faculty, but the process differs by department. Faculty can run their Annual Report and send it to the appropriate person (e.g., chair), or the chair/department admin may run the reports.

If you like, you can run your annual report for yourself and download the information for your own personal records. To run a report, click on the 'reports' tab at the top of the Activity Insight web page.

To generate reports on your own data, click on 'Reports' at the top, then you can run the pre-programmed reports on that page or *create a new report*.

For example, if you would like to download a document that lists all of your publications, you can do the following steps:

- 1) Click on "Create a new report",
- 2) Click on "Export Data",
- 3) Select the range of dates that you want to include your data,
- 4) Select the data to include. To download data specifically on your publications, click 'Change Selection'.
- 5) Un-check the box that says "Include all".
- 6) Open sub-menu for "Common Items", then select the box that says "Publications".
  - a. You might also want to include publication information from other sub-menus. For example, if you want to include book publications, these are within the "Book" menu item.
- 7) Click 'Save',
- 8) Select your file format,
- 9) Click "Run Report" at the top-right of the page.

#### 5. How can I change an incorrect Working Title?

The 'Working Title' in AI is derived from the 'Business Title' of your primary position in Workday. To verify this, visit Workday and click on 'View Profile' from the top-right account button. Your Business Title will appear under your name on the top-left of the blue menu pane.

If you feel the information is not correct, your unit's HR staff or administrator can make this change for you in Workday. You can begin the process by suggesting the correct Business Title in Workday. At the top of the Workday screen, type "**change my business title**" in the search bar, select "Change My Business Title" from the list, and proceed with the change. This change will need to be approved by your department.

*Note that any changes made and approved in Workday will not appear in Activity Insight/Faculty Success until the following Monday after the data is refreshed over the weekend.*

If the Working Title is incorrect in AI/FS, but correct in Workday, submit a ticket with your name, current working title, and correct working title to:

<https://jira.esg.wsu.edu/servicedesk/customer/portal/44/>

## 6. How can I change incorrect office information (e.g., Work Location or Contact Information)?

The **Work location**, or **Contact information**, or **Positions Start Date** on the WSU Positions screen comes from WSU's employee source system Workday (which feeds into Activity Insight). If this information is incorrect in Activity Insight, your HR administrator will need to change the information in Workday.

Once the changes are made and approved, the data will be loaded into Activity Insight the following weekend when data are refreshed.

## 7. How can I change my preferred or legal name?

You can change two types of names: your **preferred** name and **legal** name. There are different procedures to change either:

1. To change your *preferred* name: in **Workday**, at the top of the screen, type "**change my preferred name**" into the search bar.

In the Search Results, choose the "Change My Preferred Name" task and fill out the screen.

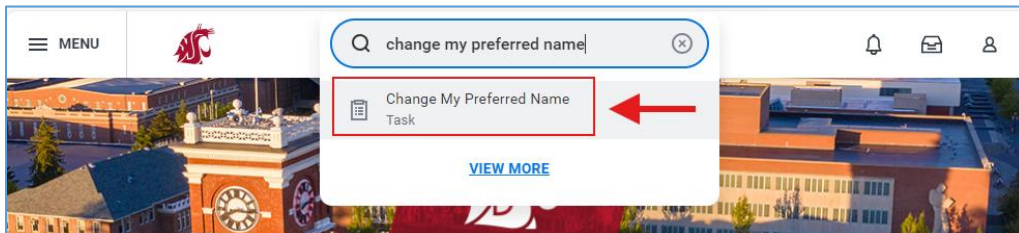


Figure 1. Demonstrating how to change preferred name

If you do not want to use your legal name as your preferred name, uncheck the field "**Use Legal Name as Preferred Name.**" Once you uncheck the box, additional form items will appear where you can change your preferred name and submit the information.

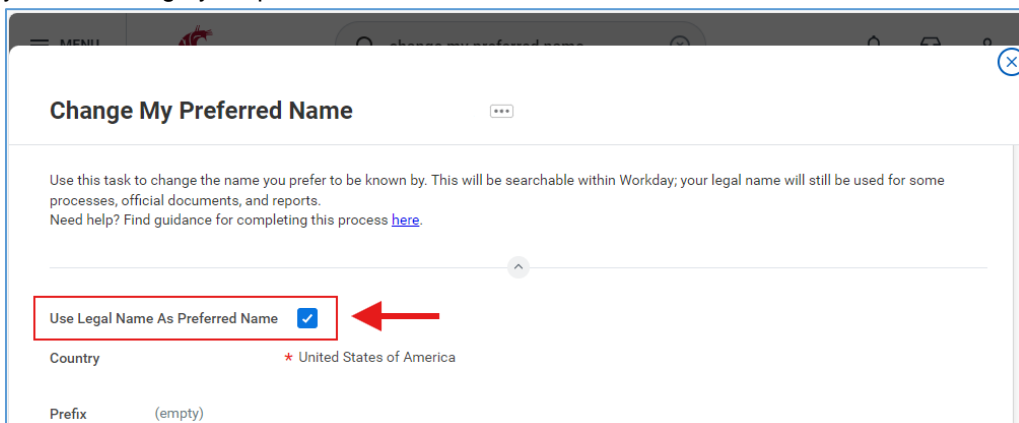


Figure 2. Demonstrating the toggling of the option of using the legal name as a preferred name

2. To change your *legal* name: in Workday, log into Workday and search for “**change my legal name**.” Then in the Search Results, choose “Change My Legal Name.” Fill in all required fields and submit the proper documentation. You should also contact the WSU Payroll Office to initiate an **official** name-change process (<https://payroll.wsu.edu/name-change/>).

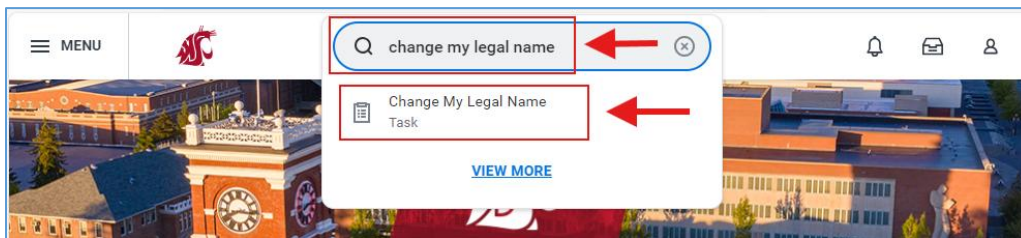


Figure 3. Demonstrating how to change the legal name on Workday.

Note that any changes made and approved in Workday will not appear in Activity Insight/Faculty Success until the following Monday after the data is refreshed over the weekend.

## 8. How can I change an incorrect WSU academic appointment or position?

The information on the Academic Appointments screen is sourced from Workday and cannot be edited in Activity Insight/Faculty Success. To correct any errors, please report them to your unit’s Academic Faculty Partner, typically your HR Administrator, who will initiate the correction in Workday.

## 9. How can I update missing information on the “Current Administrative Assignments (and Legacy/Read-only WSU Appointments)” screen?

Your position and academic appointment information can be found in three locations within the *Appointment and Administrative Information* dropdown menu:

- 1) **Current Administrative Assignments (and Legacy/Read-only WSU Appointments):** This screen displays information from the legacy system AIS/DEPPS, which is now read-only and not updated since December 2020. It will be blank for individuals hired after that date. Note that you can add an administrative assignment on this screen but cannot correct the legacy WSU appointment data.
- 2) **WSU Positions:** This screen contains your current position information, populated from the Workday system.
- 3) **WSU Academic Appointment:** This screen contains your current academic appointments, also populated from Workday. This information reflects your academic relationship with WSU, which may not always correspond to your paid position but is often related. Please note that the appointment start date may be incorrect, as it might reflect the date when Workday loaded the information into the system.

## 10. Can I upload a CV to Activity Insight/Faculty Success?

You can upload your CV to Activity Insight/Faculty Success as a Word or PDF file. However, please note that **this does NOT populate any fields**; it only uploads the static document as-is. From the **Activities** tab, find the first dropdown section titled "**Appointment and Administrative Information**," then select the '**Goals and COVID-19 Related Circumstances**' screen:

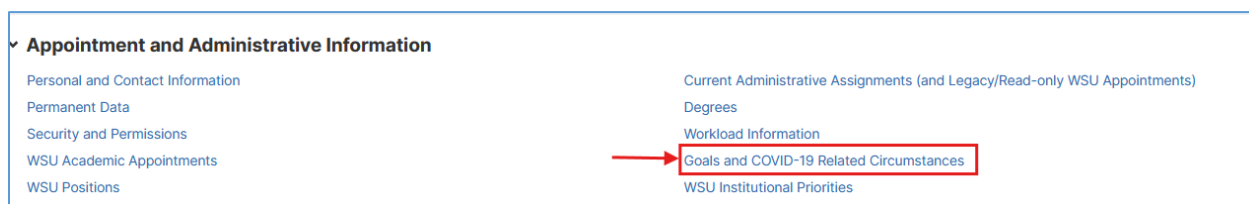


Figure 4. Demonstrating the location of "Goals and COVID-19 Related Circumstances" in Activity Insight.

Click the "Add New" button. Enter "Review Year" (entering a year is required to save the record), and you will see "Upload CV for the review year" appear at the bottom of the new screen. You will have the option to either drop a file or select one to upload. Click on "SAVE" after your CV is uploaded.

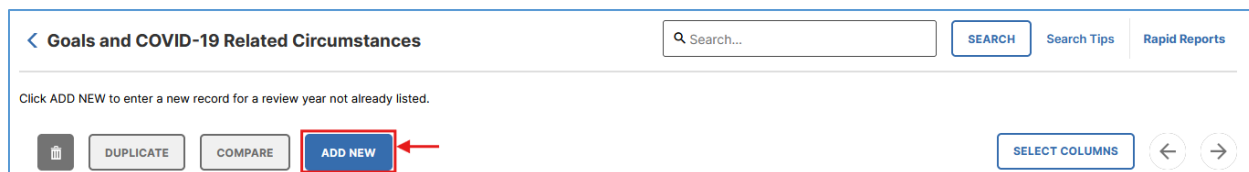


Figure 5. Demonstrating how to add a new entry.

## 11. What if my department's information is incorrect on the Securities and Permissions screen?

The information appearing on the **Securities and Permissions** screen will always reflect your current position(s)/academic appointment(s). You will see the college/departments for all positions or appointments you held over the past six-year period. The system is configured to include six years of information because customizations were made for different colleges' and units' accreditation reporting.

### a. Can I remove a department?

Errors in your department and college information cannot be corrected through Activity Insight/Faculty Success. Please report these errors to your unit administrator (typically the HR administrator) to initiate corrections in Workday. This will ensure you have access to all necessary screens in Activity Insight/Faculty Success.

### b. Can I change the order of departments?

The order of the colleges and departments listed has no meaning and is based on the data set that populates the screen. There is no need for the order to be changed since the order does not matter in the access to screens and reports assignment.

## 12. What if the courses I taught did not populate in Activity Insight/Faculty Success?

For courses with enrollment to appear on your Scheduled Teaching screen, you must be listed in myWSU as a primary or secondary instructor with >0 effort. You may want to talk with your department if you disagree with how the class is listed or you are not appearing as an instructor in myWSU. All changes need to be made in myWSU, usually by the course scheduler in your department or college.

Courses are only loaded in Activity Insight/Faculty Success if it is not past 365 days after the end of the semester. Note that changes to courses in myWSU beyond the 365 days will not be loaded to Activity Insight/Faculty Success. Also, if you would like to receive credit for teaching a class(es) not listed through myWSU, you could add your teaching information to the Activity Insight/Faculty Success screen "Other Teaching."

To verify the information on the *Scheduled Teaching* screen, check the Teacher Assignment in OBIEE (Oracle Business Intelligence Enterprise Edition) on myWSU (see instructions below). Once changes are made in myWSU, they will appear in Activity Insight/Faculty Success after the data refreshes each weekend.

To check the Teacher Assignment in OBIEE on myWSU:

1. Log in to the myWSU Homepage and click "OBIEE Reporting."

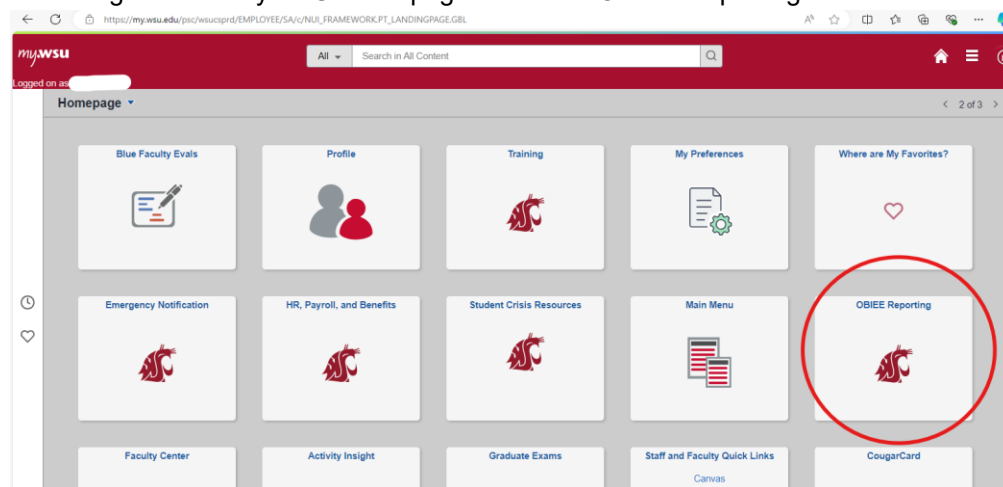


Figure 6. Demonstrating how to find OBIEE Reporting in myWSU.

2. Open the Dashboards dropdown at the upper right.
3. Select "WSU Data Validation."
4. Select "Teacher Assignment."

This will open a new screen providing information about Group Taught Classes, Group Taught Not 100%, and Individually Taught Classes, among others. You can filter by your name or academic organization for a given term. For a detailed explanation of OBIEE Reporting, refer to the Appendix of the Activity Insight/Faculty Success Reference Guide.

### 13. What if a course I did *not* teach appears in my list of courses?

It is not possible to delete existing records in the *Scheduled Teaching* screen except by requesting that your unit administrator (typically the person handling course scheduling) make changes to the source record in myWSU. Then, once the information is corrected in myWSU, you must submit a Digital Measures Service Desk ticket so the Activity Insight/Faculty Success administrator can delete the record. To submit a ticket, go to:

<https://jira.esg.wsu.edu/servicedesk/customer/portal/44/>

### 14. What if I am a graduate advisor for a student not listed on Directed Student Learning?

If you serve on a graduate student's committee as recorded on their Program of Study, information from myWSU will automatically populate some fields. You can also add records for students not listed in myWSU, such as non-WSU students, graduate students who have not yet filed a Program of Study, undergraduates with special projects, or students rotating through your lab. To add this information, select the Directed Student Learning section under Teaching/Mentoring. Note that you can only edit the information you add, not the information populated from the source system.

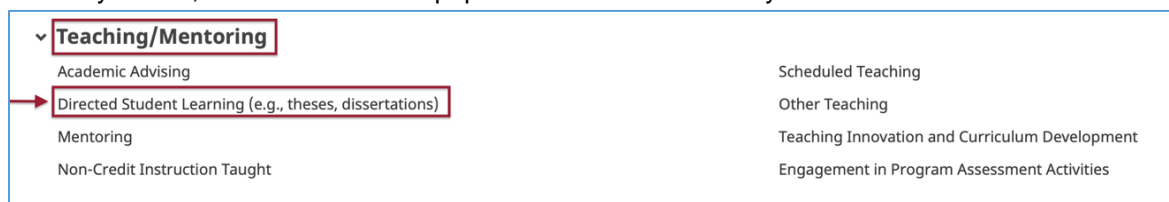


Figure 7. Demonstrating where to find "Directed Student Learning" under the Teaching/Mentoring domain.

### 15. How do I select only those students on whose committees I serve?

The information in Directed Student Learning is fed in from the Graduate Research Module in myWSU. You can exclude the duplicate record or select those records you do not want in your annual review by clicking on the "Exclude from Reports" box then "SAVE":

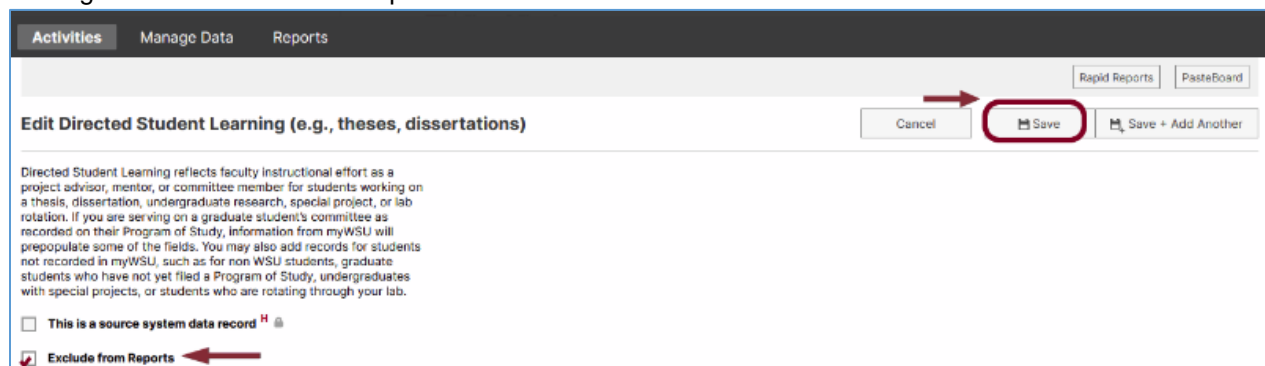
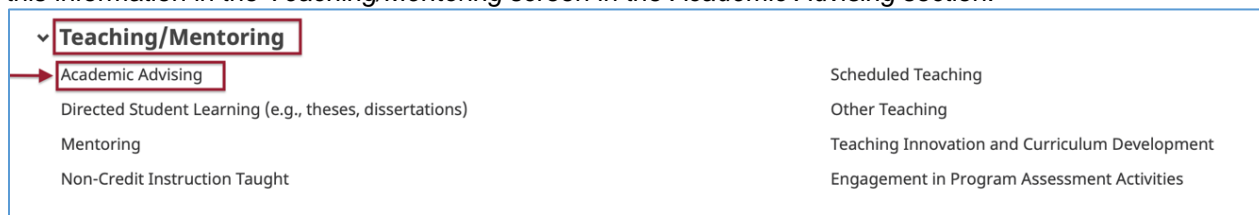


Figure 8. Demonstrating how to Save and Exclude from Reports the Directed Student Learning entry.

## 16. How can I fix an incorrect number of advised students in Academic Advising?

Faculty may modify the numbers in these fields to reflect their correct academic advising load more accurately. Faculty may also enter a description of the types of academic advising they conduct and estimate the number of hours spent per academic year on advising activities if they wish. You can modify this information in the *Teaching/Mentoring* screen in the *Academic Advising* section.



Teaching/Mentoring

Academic Advising

Directed Student Learning (e.g., theses, dissertations)

Mentoring

Non-Credit Instruction Taught

Scheduled Teaching

Other Teaching

Teaching Innovation and Curriculum Development

Engagement in Program Assessment Activities

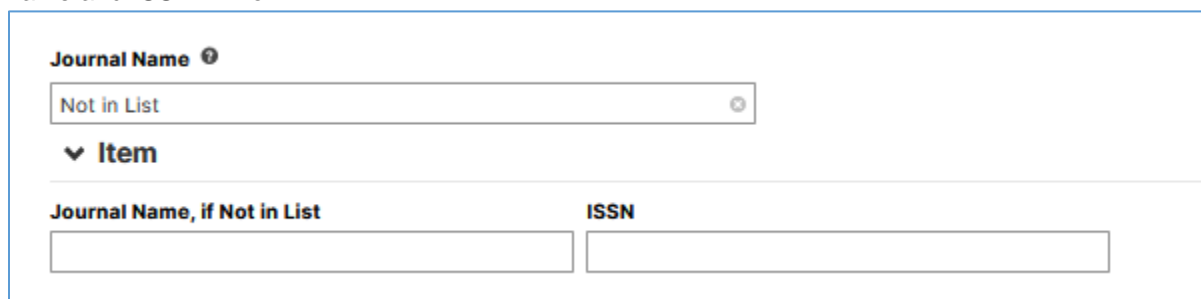
Figure 9. Demonstrating where to find "Academic Advising" in the Teaching/Mentoring domain on Activity Insight.

## 17. How do I get BLUE course evaluations into Activity Insight/Faculty Success?

You can upload a copy of your **BLUE** course evaluations into Activity Insight/Faculty Success on the 'Scheduled Teaching' screen corresponding to that course.

## 18. What if my journal name is not in the Publications dropdown list?

If a journal name is not in the dropdown list, type in or choose "Not in List" from the journal name dropdown. The screen will refresh, and a new field will appear below where you can enter the journal's name and ISSN if known.



Journal Name ⓘ

Not in List

Item

Journal Name, if Not in List

ISSN

Figure 10. Demonstrating how to enter a journal name that is not currently in the list.

## 19. How do I change the order of authorship on publications?

To change the authorship order on the publications screen, click *Publications* from *Scholarship/Research*. Click on the journal of interest and scroll down to Authors/Editors/Translators. You can drag and drop by clicking (and holding down the mouse) on the left-hand side (where you see this ☰) next to the author's last name or click on the "Actions" dropdown arrow and select "Move Row." When you are done, click "SAVE" at the top of the screen. Please note that you will change the author's position every time you drag and drop. See the figure below:

**▼ Authors/Editors/Translators (2)**

Please order the contributors in the order of contribution.  
Please either select a person from the drop-down list or enter their name in the input fields.

1st Author/Editor/Translator

People at Washington State University	First Name	Middle Name/Initial	Last Name
☰ Sunday, Oluwafemi J (oluwafemi.sunday)	Oluwafemi	Johnson	Sunday

**Institution/Company** <sup>Ⓜ</sup> Washington State University    **Role** <sup>\*</sup> Author     Equal Contribution    **If a student, what is his/h** Graduate

2nd Author/Editor/Translator

People at Washington State University	First Name	Middle Name/Initial	Last Name
☰ Adesope, Olusola (olusola.adesope)	Olusola	O	Adesope

**Institution/Company** <sup>Ⓜ</sup> Washington State University    **Role** <sup>\*</sup> Author     Equal Contribution    **If a student, what is his/her level?**

Figure 11. Demonstrating how to move the placement of contributors.

## 20. Can I import publications directly from a Third Party such as ORCID or Web of Science?

You can import publication data directly into the Activity Insight/Faculty Success publication screen through third-party services such as Web of Science, Crossref, ORCID, BibTex, and PubMed. Follow these steps:

- 1) Within the Publications overview area, Click **“Import.”**

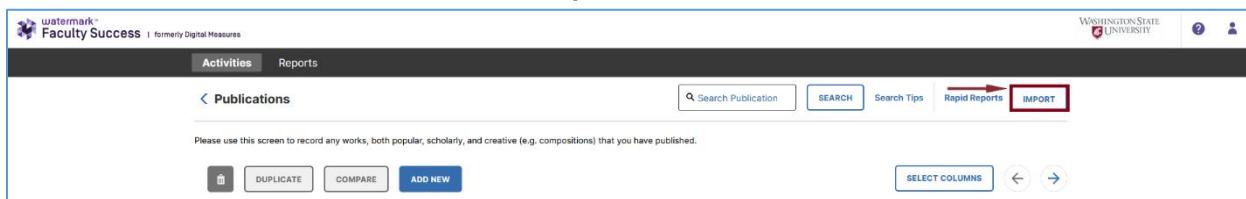


Figure 12. Demonstrating how to import publications from a third party.

- 2) Select the Third Party and enter your search criteria.

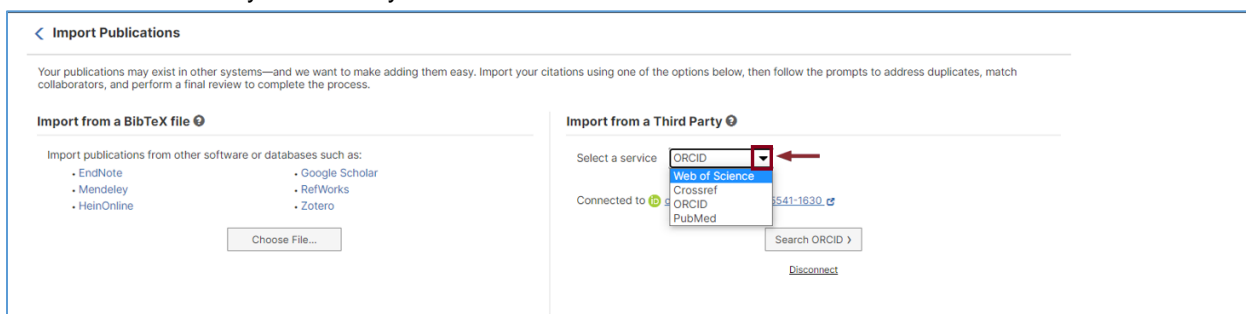


Figure 13. Demonstrating how to select the third party importer.

For more information on how to import publications, including BibTex files, you can visit Watermark documentation:

<https://support.watermarkinsights.com/hc/en-us/articles/4409240052763-Publication-Import-Overview>

## 21. How can I change an incorrect Grant status or amount?

The information on the Grants and Contracts page is pre-populated from the WSU Office of Research Support and Operations (ORSO) database. If any information is incorrect, please contact ORSO at [orso@wsu.edu](mailto:orso@wsu.edu). Note that ORSO does not track internal grants (such as department grants or seed grants). You may add those records by clicking **“Add New”** on the *Contracts, Grants, and Fellowships* summary page (see image below). Additionally, please use the **“Add New”** option to include any grants or awards you received prior to working at WSU.

**< Contracts, Grants, and Fellowships**  **SEARCH** Search Tips Rapid Reports

This screen is meant to contain all contracts, grants, and fellowships. Externally sponsored projects are piped in from the Office of Research database (ORSO). To request corrections to locked source system records, please contact [orso@wsu.edu](mailto:orso@wsu.edu).

For any items not included in ORSO data, such as departmental awards or internal reallocations, you may add supplementary data by selecting "Add New Item."




 **DUPLICATE** **COMPARE** **ADD NEW** **SELECT COLUMNS**  

Figure 14. Demonstrating how to add a new contracts, grants, or fellowships entry.