

# ACTIVITY INSIGHT/FACULTY SUCCESS

## GUIDE FOR ADMINISTRATIVE ROLES



**WASHINGTON STATE**  
UNIVERSITY



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# Overview

Activity Insight/Faculty Success (AI) is Washington State University's tool for collecting faculty information for annual reviews and other reporting purposes. It is a browser-based tool hosted by the third-party company, Watermark. AI enables faculty to run their Annual Review Report and to build reports on teaching, research, and service activities.

AI sources faculty information directly from internal WSU records (including Workday, myWSU, and ORSO), but faculty members also need to add or edit items. Edits are by manual entry, file upload, and/or linking to third-party databases such as ORCID. Administrators can add/edit data, generate preformatted or custom reports, and export tabular data.

This guide introduces how **ADMINISTRATORS** can use AI to summarize and report on activities for faculty members in their department or college.

This guide will provide step-by-step instructions on generating reports, customizing reports, exporting tabular data, and more.

## Useful Links

Provost's overview: <https://provost.wsu.edu/annual-review/activity-insight/>

Direct login to AI: <https://ai.provost.wsu.edu/>

Helpdesk (Jira support tickets): <https://jira.esg.wsu.edu/servicedesk/customer/portal/44/>

# Getting Started

## Login for to AI

To log in, visit <https://ai.provost.wsu.edu/>. Enter your WSU credentials to log in (username and password).

## Activities Page

The 'Activities' page provide a list of activity screens where you can add and review your own information. (See image below).

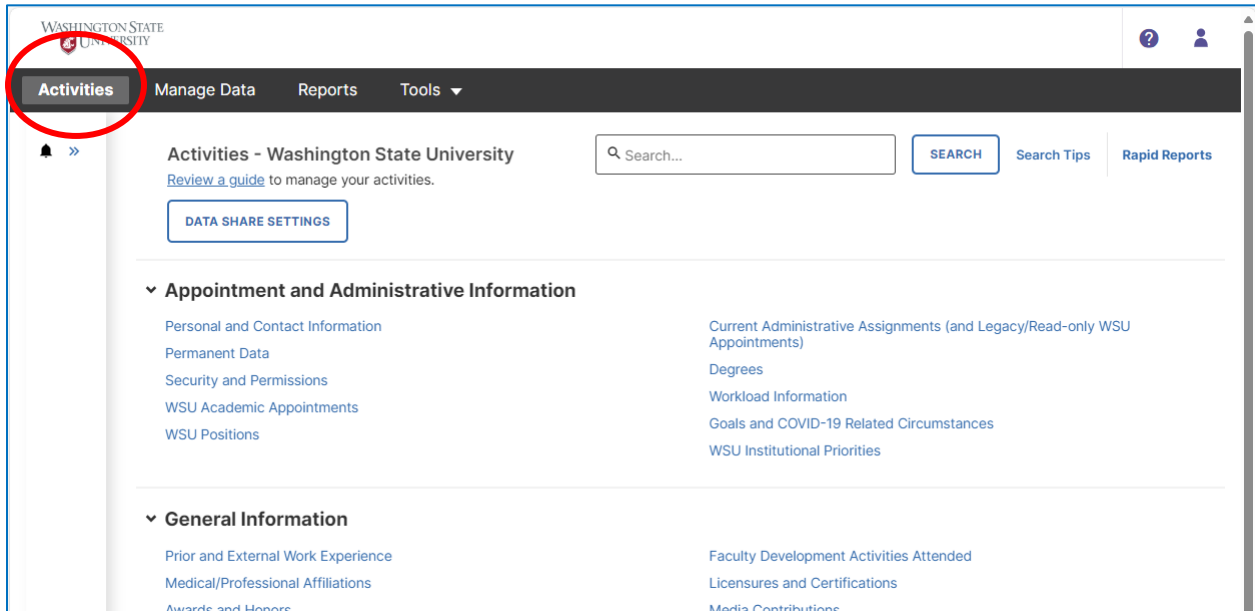


Figure 1. Demonstrating how to navigate towards the Activities page on Activity Insight

## Reports Page

The 'Reports' page allows you to run existing reports, or create your own reports. (See image below).

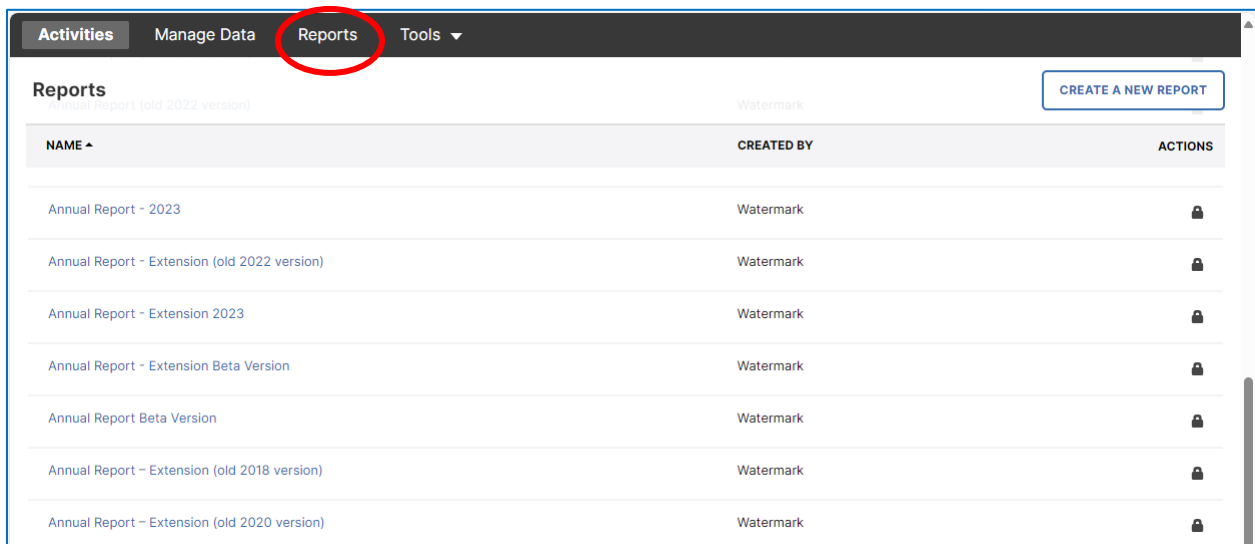


Figure 2. Demonstrating how to navigate to the Reports page on Activity Insight

# Run Annual Report

Activity Insight/Faculty Success allows administrators to run an existing annual report for faculty members in their department, college, or other units that they have permissions to view. Administrators with a college-level security role can view and download the report template to familiarize themselves with the annual report criteria. You can only view this template but cannot modify it. If you need the template to be revised or modified to align with your college or department needs, you must submit a work request.

## How to Run an Annual Report

1. In Activity Insight, click "Reports" at the top of the page.

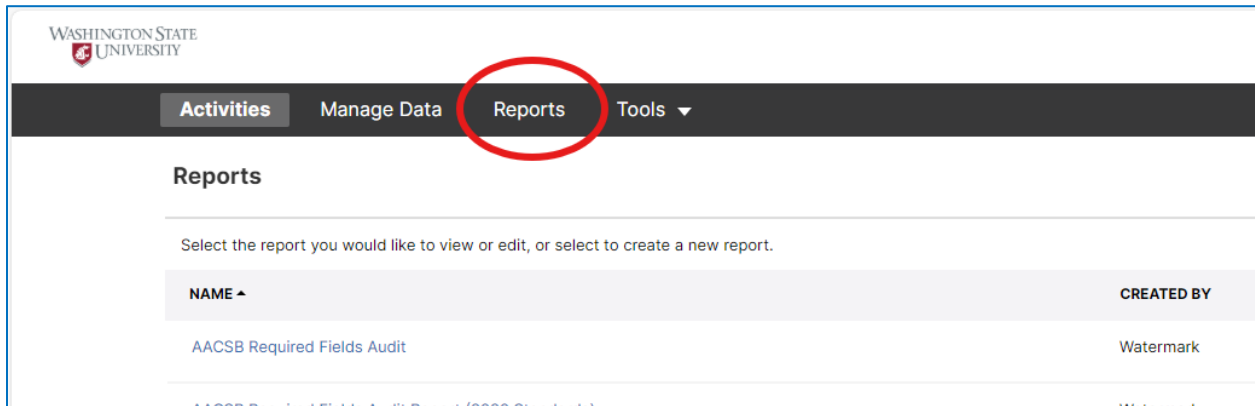


Figure 3. Demonstrating where to first click to begin running a report

2. Scroll down and click on "Annual Report - 2024."

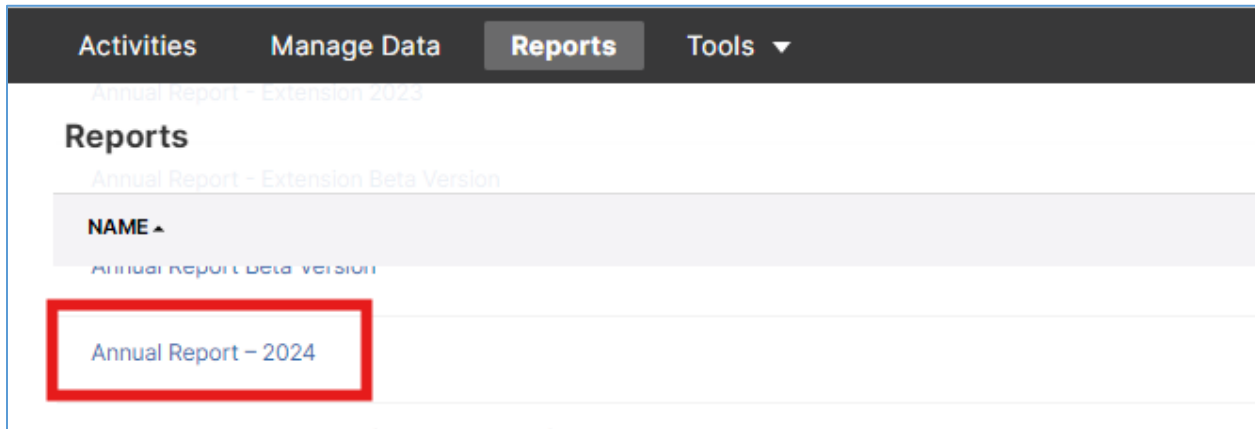


Figure 4. Demonstrating where to find the report 'Annual Report - 2024'

3. Fill in the information on the screen to generate a new customized report.

The screenshot shows the 'Run Annual Report - 2024' interface. At the top, there are navigation tabs: 'Activities', 'Manage Data', 'Reports', and 'Tools'. Below the tabs, there is a back arrow, the title 'Run Annual Report - 2024', and a 'RUN REPORT' button. A link 'Download this report's template' is also present. The main content area is divided into four sections:

- 1 Date Range:** Contains 'Start Date' (1/1/2024) and 'End Date' (12/31/2024) fields with calendar icons.
- 2 Whom to Include:** Contains 'Groups to Include' (All groups selected) and 'Individuals to Include' (All Individuals selected) sections, each with a 'Change Selection' link. A checkbox 'Users must be enrolled in all selected groups to be in this report.' is also present. Below these is an 'Include These Accounts' dropdown menu set to 'Enabled Only'.
- 3 Report Options:** Contains two questions: 'a) Do you want an abbreviated report?' (Detailed) and 'b) Do you want to hide sections without any activities?' (Hide).
- 4 File Format:** Contains a 'File Format' dropdown menu set to 'Microsoft Word (.doc)'.

Figure 5. Demonstrating the various fields which can be found in this report

- 4. Set Date Range:** The first item you need to specify in the report parameters is the Date Range. Change the start and end dates in the "Date Range" to reflect the year of your annual review report.

This close-up screenshot shows the '1 Date Range' section. It features two date input fields: 'Start Date' with the value '1/1/2024' and 'End Date' with the value '12/31/2024'. Each field has a calendar icon to its right.

Figure 6. Demonstrating how to change the date range of the report

- 5. Select Whom to Include:** To select which groups to include in your report, click on "Change Selection" under "Groups to Include." The default setting includes all users in your assigned scope. Clicking "Change Selection" brings up a pop-up menu on the right.

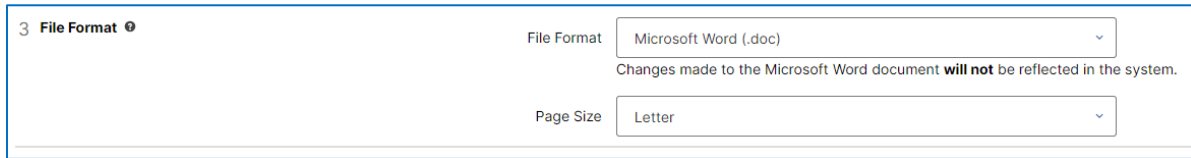
You can also run reports for individual faculty by clicking "Change Selection" under "Individuals to Include."

Finally, under the "Include These Accounts," decide if you wish to include enabled accounts, disabled accounts, or both kinds of accounts. Generally, enabled accounts include faculty with current monthly appointments or appointments ended within the last six months.

This close-up screenshot shows the '2 Whom to Include' section. It highlights the 'Change Selection' links for both 'Groups to Include' and 'Individuals to Include' with red circles. The 'Include These Accounts' dropdown menu is also highlighted with a red box and is set to 'Enabled Only'. The 'All groups selected' and 'All Individuals selected' status indicators are also visible.

Figure 7. Demonstrating how to select whom to include in the report

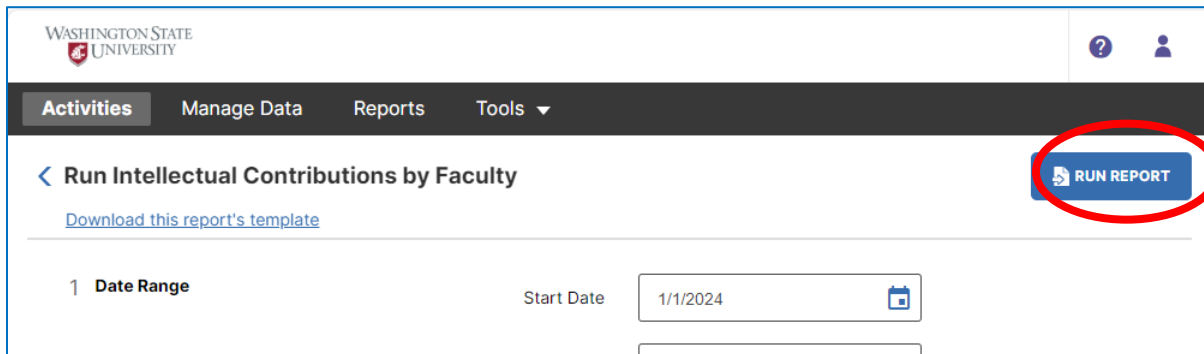
6. **Select File Format:** Select the file format you prefer for your annual report. Click on the box to choose from the list: Microsoft Word (.doc), PDF, or Web Page (.html)



The screenshot shows a form titled "3 File Format" with two dropdown menus. The first dropdown is labeled "File Format" and is currently set to "Microsoft Word (.doc)". Below it, a note states: "Changes made to the Microsoft Word document **will not** be reflected in the system." The second dropdown is labeled "Page Size" and is currently set to "Letter".

Figure 8. Demonstrating how to change and select the file format of the report

7. Click "Run Report" at the top right corner of the screen.



The screenshot shows the Washington State University logo in the top left corner. A navigation bar contains "Activities", "Manage Data", "Reports", and "Tools" with a dropdown arrow. The main heading is "Run Intellectual Contributions by Faculty" with a back arrow on the left and a "RUN REPORT" button on the right, which is circled in red. Below the heading is a link: "Download this report's template". A section titled "1 Date Range" includes a "Start Date" field with the value "1/1/2024" and a calendar icon.

Figure 9. Demonstrating how to run the report

Note that not all information that faculty enter are included in the Annual Report. To supplement this information, you can download data from any screen of interest. See the section of Export Data Reports for more information.

## Run Existing Report (generic)

Activity Insight (AI) allows administrators to run an existing report on activities for faculty members in their department, college, or other units. As an administrator, you can access and run a report on already saved information in your Report utility. This guide provides you with a step-by-step process of running an existing report.

### How to Run an Existing Report

1. Click "Reports" at the top of the webpage.

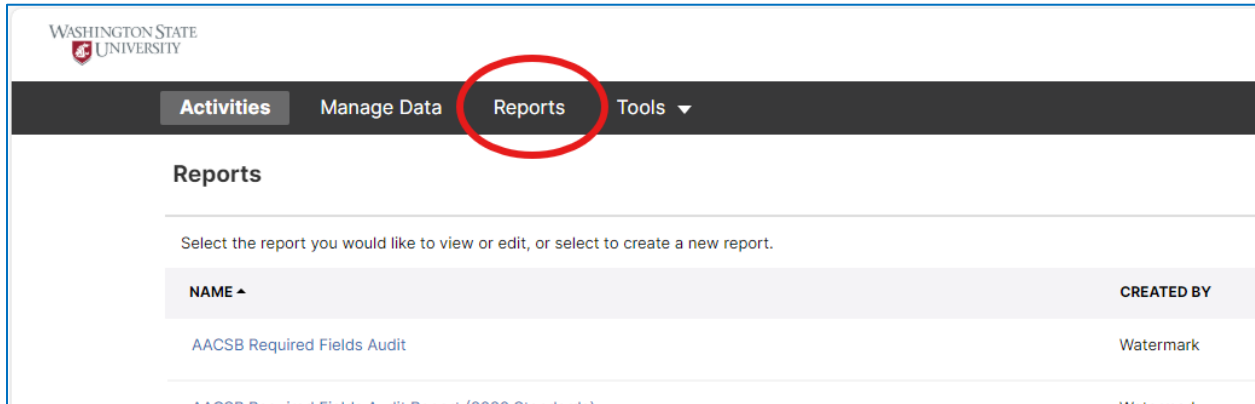


Figure 10. Demonstrating where to first click to begin running a report

2. Scroll down and select the existing report you want to run. In this example, we want to run a report on "Intellectual Contributions by Faculty."

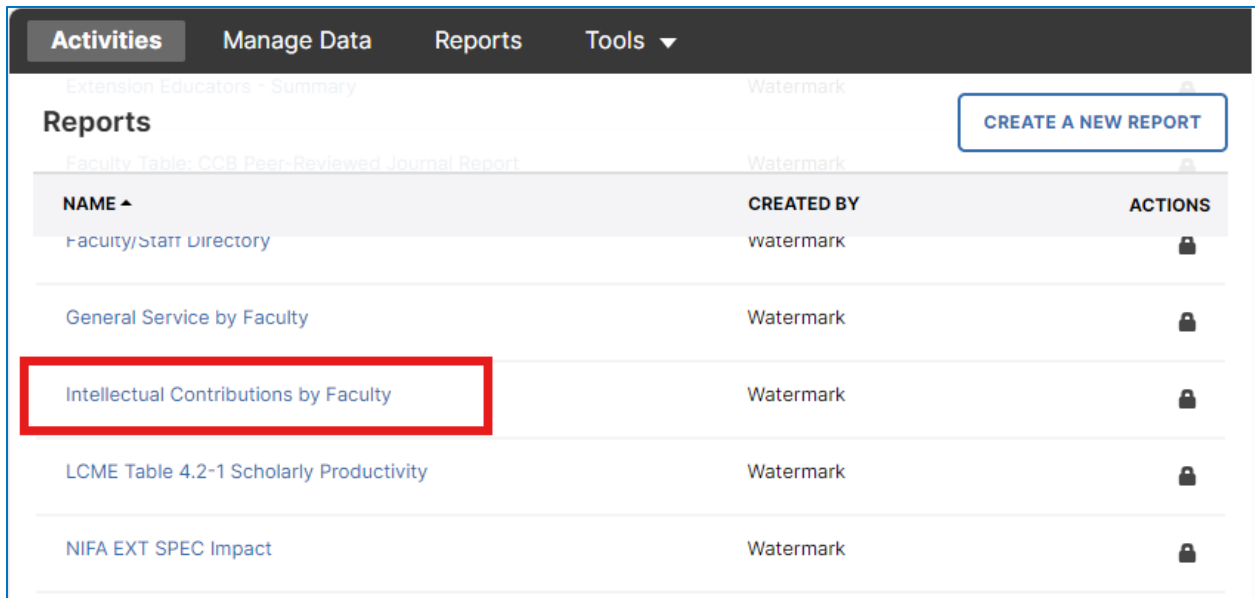


Figure 11. Demonstrating the location of a pre-existing report in the Reports page

3. Complete the required fields on the screen to create a new customized report.

Figure 12. Demonstrating the various entry fields within a typical report

1. **Set Date Range:** The first item you need to specify in the report parameters is the Date Range. Change the start and end dates in the "Date Range" to reflect the year of your annual review report.

Figure 13. Demonstrating how to enter a date range for your report

2. **Select Whom to Include:** To select which groups to include in your report, click on "Change Selection" under "Groups to Include." The default setting includes all users in your assigned scope. Clicking "Change Selection" brings up a pop-up menu on the right.

You can also run reports for individual faculty by clicking "Change Selection" under "Individuals to Include."

Finally, under the "Include These Accounts," decide if you wish to include enabled accounts, disabled accounts, or both kinds of accounts. Enabled accounts include faculty with current monthly appointments or appointments ended within the last six months.

2 **Whom to Include**

Groups to Include **All groups selected**  
   
 Users must be enrolled in all selected groups to be in this report.

Individuals to Include **All Individuals selected**

Include These Accounts **Enabled Only**

Figure 14. Demonstrating how to change whom to include in the report

4. **Select File Format:** Select the file format you prefer for your annual report. Click on the box to choose from the list: Microsoft Word (.doc), PDF, or Web Page (.html)

3 **File Format**

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

Page Size **Letter**

Figure 15. Demonstrating how to change and select the file format of the report

5. Click **"Run Report"** at the top right corner of the screen.

WASHINGTON STATE UNIVERSITY

Activities Manage Data Reports Tools

< **Run Intellectual Contributions by Faculty**

[Download this report's template](#)

1 **Date Range** Start Date **1/1/2024**

Figure 16. Demonstrating how to run the report

## Viewing Report Template

The Report Template basically shows you how the reports are generated, and allows you to see the intricacies of how the data is populated in each field. As an administrator, you can download and view the report template built into the system from the Report utility screen. The template looks something like this:

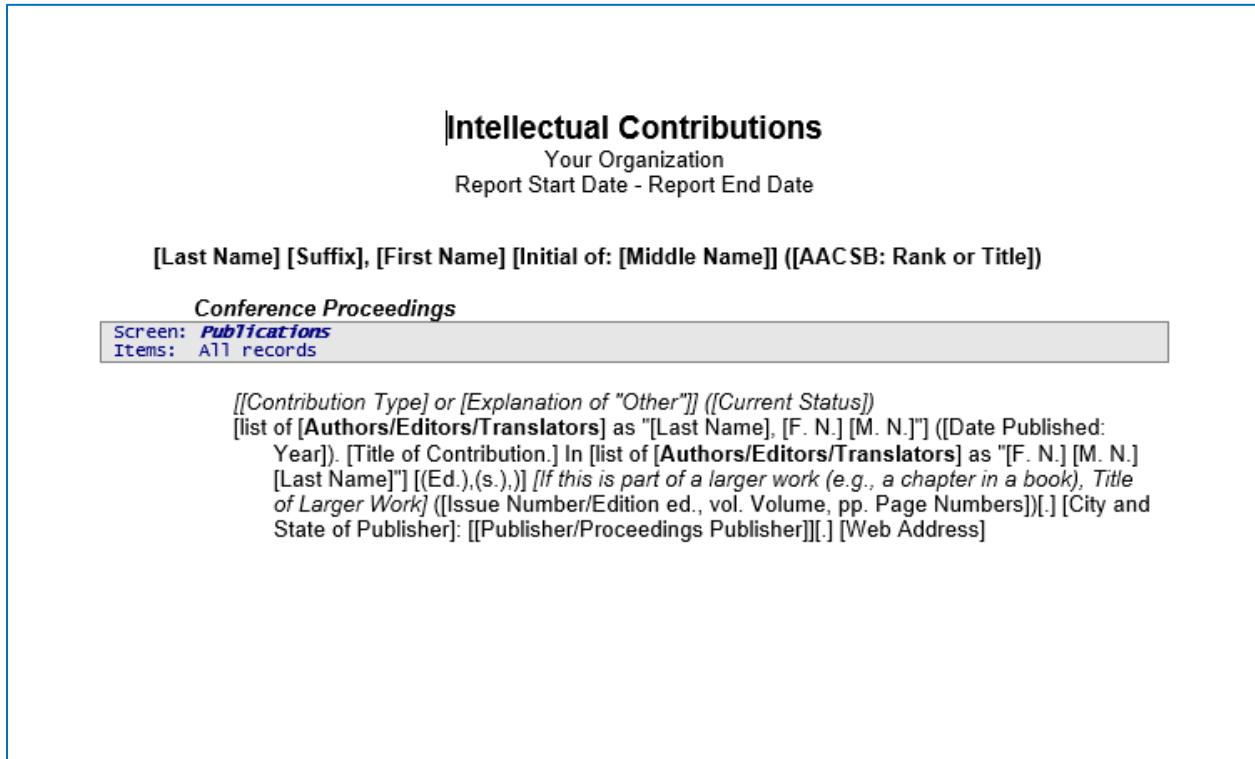


Figure 17. Demonstrating what a typical report template looks like

The report's area and features will differ depending on the assigned security roles and the screen that you are exploring. For example, Administrators with a college-level security role can view and download the report template to understand the criteria for generating reports. You can only view this template but cannot modify it. If you need the template to be revised or modified to align with your college or department needs, you must submit a work request

### How to View a Report Template

1. In Activity Insight, click "Reports" at the top of the page.

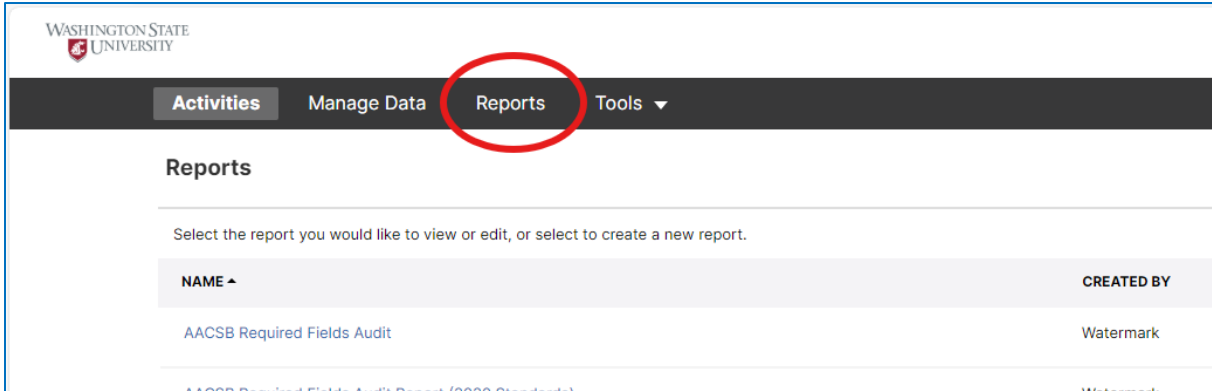


Figure 18. Demonstrating how to locate the Reports page

2. Scroll down and select the report you want to view (e.g., Intellectual contributions by Faculty Report)

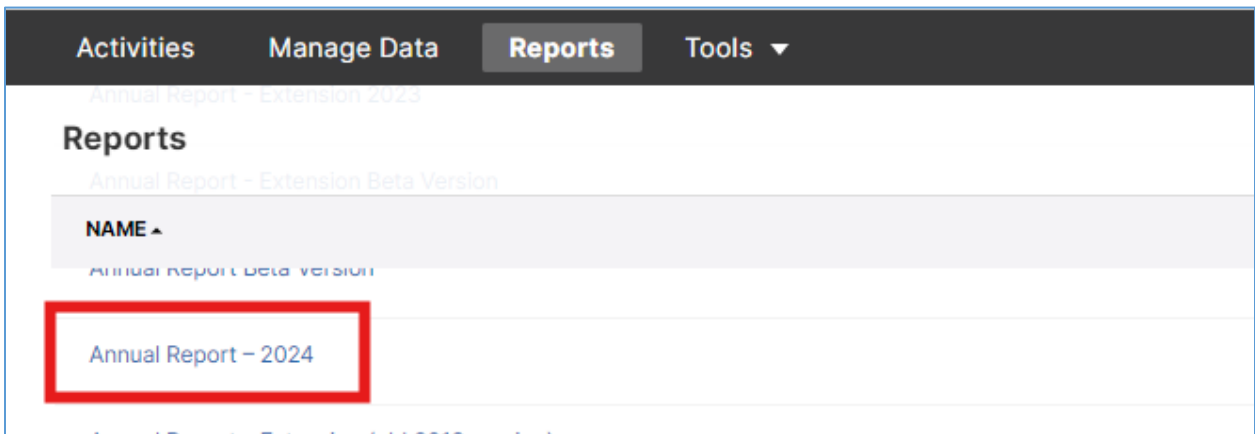


Figure 19. Demonstrating how to locate a specific report

3. Click "Download this report's template" under the report name at the top of the screen

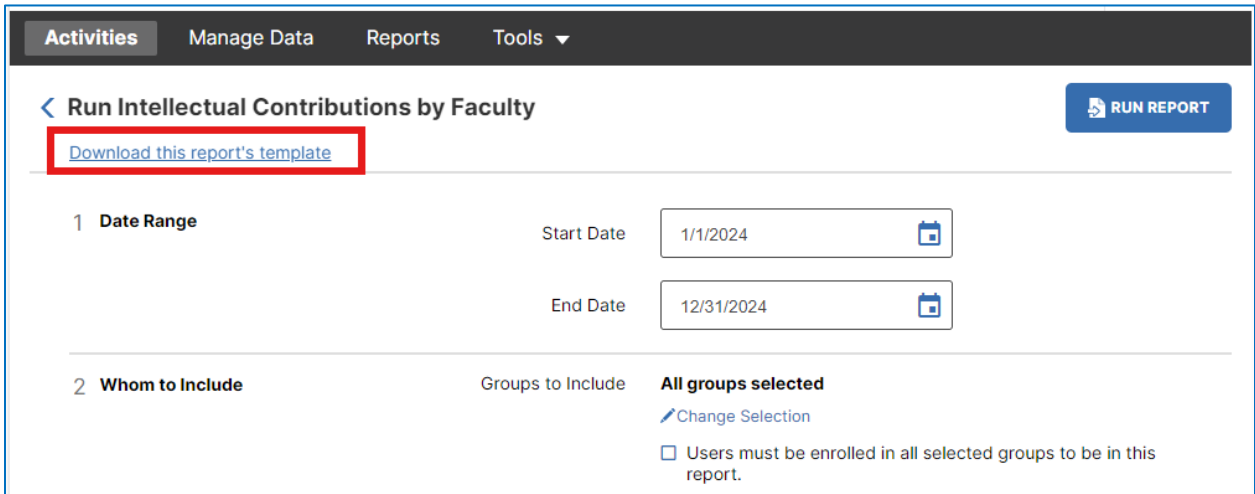


Figure 20. Demonstrating where to click to download the report

4. The template will be downloaded to a Word document. This template can then be modified and attached when submitted with the Work Request.

# Export Data Reports

This process enables you to export your data and provides access to record metadata, including record IDs and the calculated date range of each record. You can generate and export raw data in .CSV format.

Note: Access is provisioned through a security role permission; the permission is included in administrative security roles by default.

## Purpose

Exporting raw data in .CSV format allows you to open the data in excel and enables you to filter and format your reports in a way that makes them easy to read and parse information. This is especially useful when you share reports with college deans, department chairs, and directors who want both overviews and specific information.

## How to Export Data

1. On the Activity Insight page, click on the "Reports" utility in the top navigation bar.

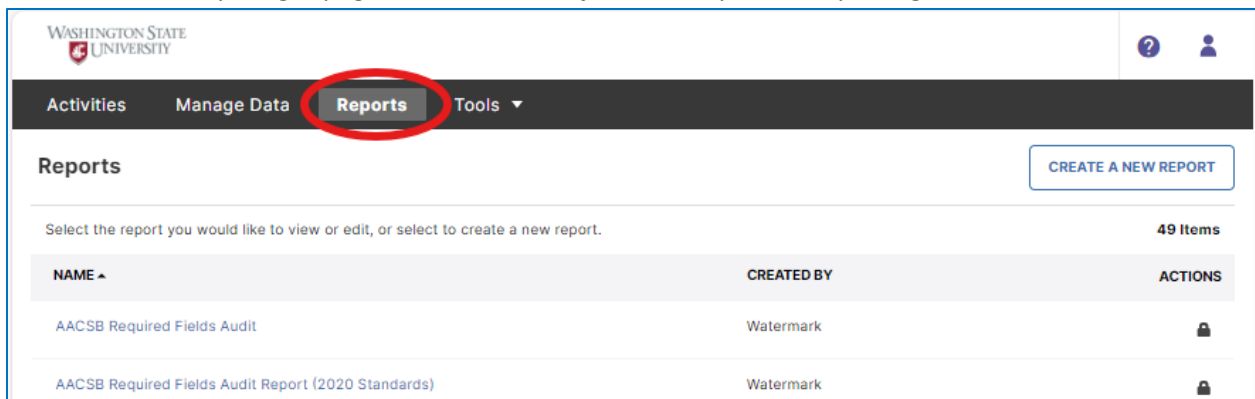


Figure 21. Demonstrating how to navigate to the Reports page

2. Click on "Create a New Report."

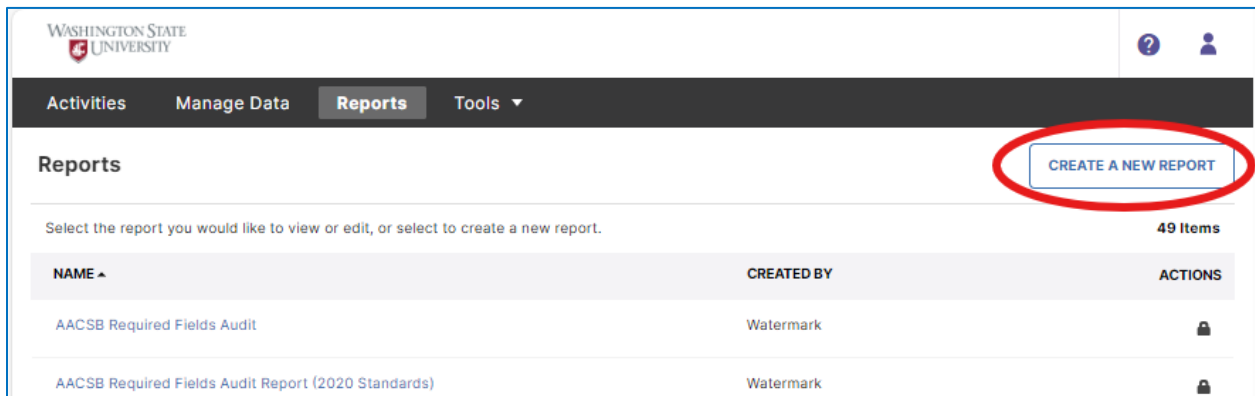


Figure 22. Demonstrating how to create a new report

3. Select "Export Data" Depending on your security role, you should see the three options shown below.

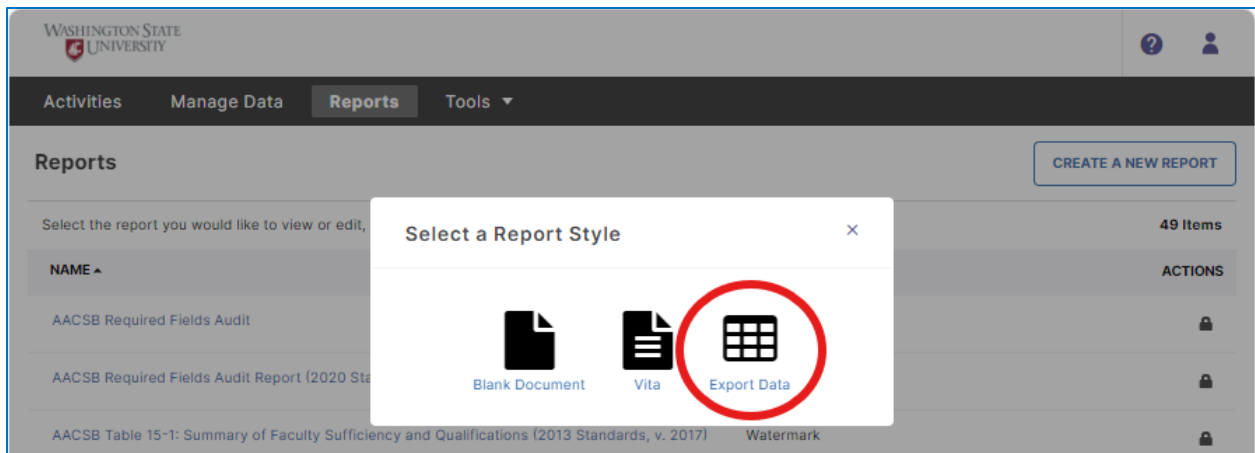


Figure 23. Demonstrating where to navigate to export data

4. Fill in the information on the screen to generate a new customized report.

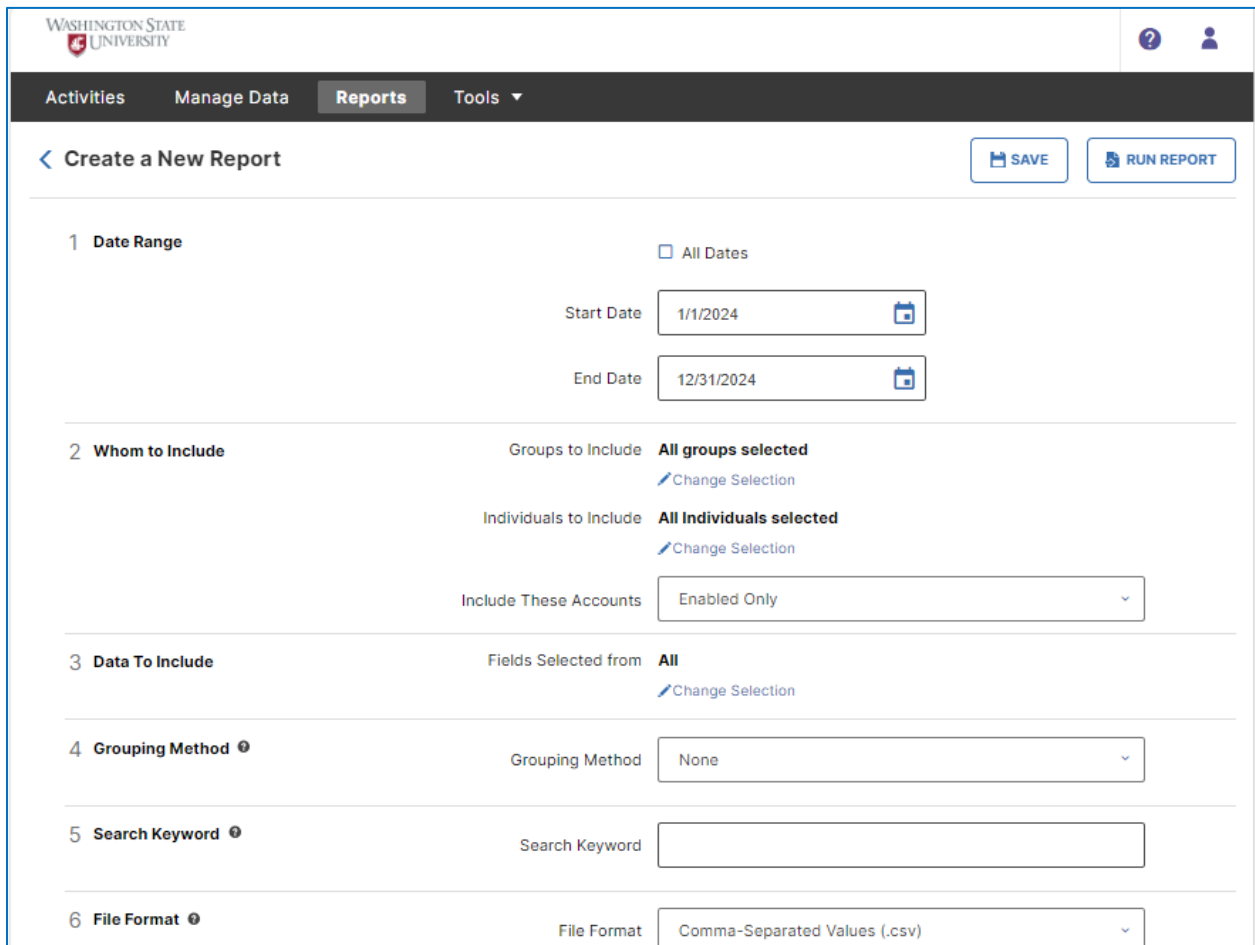


Figure 24. Demonstrating the various fields available to export from the report

5. **Set Date Range:** The first item you need to change in the report parameters is the Date Range. Change the start and end dates in the "Date Range" to reflect the year of your annual review report.

Note: if you want your report to include all data entered into the system by all users, check the "All Dates" box.

The screenshot shows the 'Create a New Report' page. At the top, there are tabs for 'Activities', 'Manage Data', 'Reports', and 'Tools'. Below the tabs, there is a back arrow, the text 'Create a New Report', and two buttons: 'SAVE' and 'RUN REPORT'. The main section is titled '1 Date Range'. It contains an unchecked checkbox labeled 'All Dates'. Below this, there are two date input fields: 'Start Date' with the value '1/1/2024' and 'End Date' with the value '12/31/2024'. Each date field has a calendar icon to its right. A red box highlights the 'All Dates' checkbox and both date input fields.

Figure 25. Demonstrating how to select the date range of your data

6. **Select whom to Include:** "All" is the default setting for "Whom to Include" and will include all users in your assigned scope.

You can modify "Whom to Include" by choosing "**Change Selection**," which will give you the pop-up menu on the right. You can select to include people by 'Groups' or 'Individuals'.

Lastly, decide if you wish to include enabled, disabled, or both types of accounts. Enabled accounts include faculty with current monthly appointments or have ended within the last six months.

The screenshot shows the '2 Whom to Include' section. It has three rows. The first row is 'Groups to Include' with the value 'All groups selected' and a 'Change Selection' link highlighted with a red box. The second row is 'Individuals to Include' with the value 'All individuals selected' and a 'Change Selection' link highlighted with a red box. The third row is 'Include These Accounts' with a dropdown menu set to 'Enabled Only', which is also highlighted with a red box.

Figure 26. Demonstrating how to select whom to include in your data

7. **Select the Data to Include:** The "Data to Include" is one of the most important parameters when getting the data out of the system. Click "**Change Selection**" to select only the data you want for your reporting.

The screenshot shows the '3 Data To Include' section. It has one row with 'Fields Selected from' set to 'All' and a 'Change Selection' link highlighted with a red box.

Figure 27. Demonstrating how to change the selection of data to include

Un-check the "**Include All**" checkbox so that none of the checkboxes are marked. Click the arrow next to "**Common Items**" to expand the selection (see below). Scroll down the "Common Items" list until you find your desired item.

For example, if you are trying to pull data on **Goals and COVID-19 Related Circumstances**, you would click on the checkbox next to "COVID-19 Related Circumstances and Goals" to include all information about COVID-19 Related Circumstances and Goals.

Note: Several categories include information about publications. If you run a report on publications, each category with publications information will need to be checked to ensure all are included in the report. For more information, see the document on creating a *Self-Service Report for Publication*.

Click on "SAVE" to save all your selected item. See screenshots below:

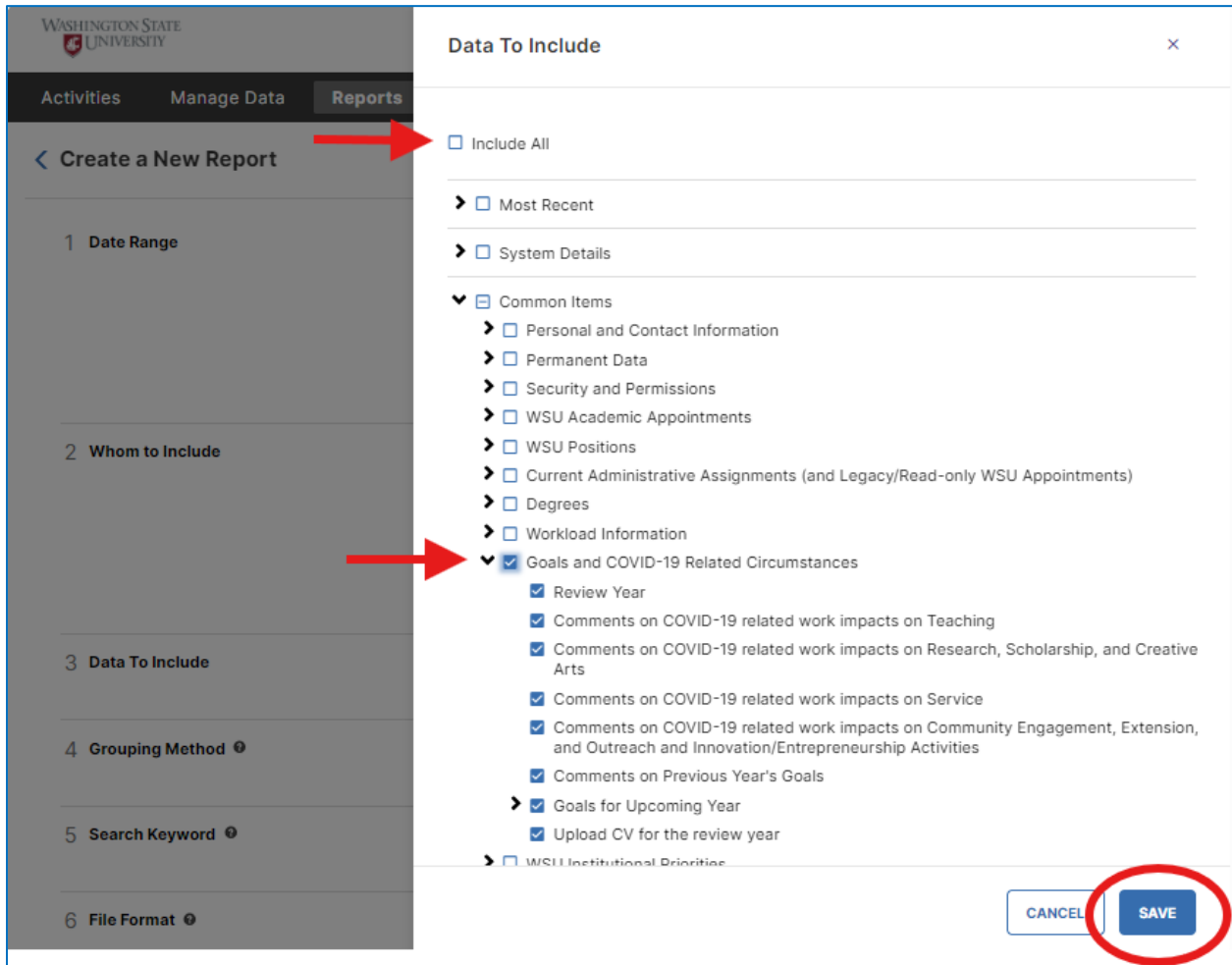


Figure 28. Demonstrating how to select specific data to include

8. **Select Grouping Method:** The grouping method lets you choose how the report is grouped when exported.

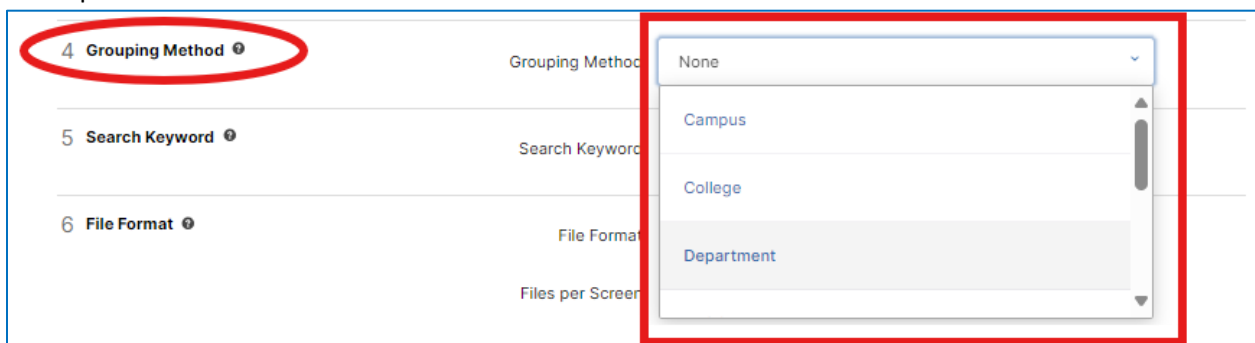


Figure 29. Demonstrating how to select how the data is grouped

9. **Set your Search Keywords:** Here, you can enter keywords to only pull records containing those words

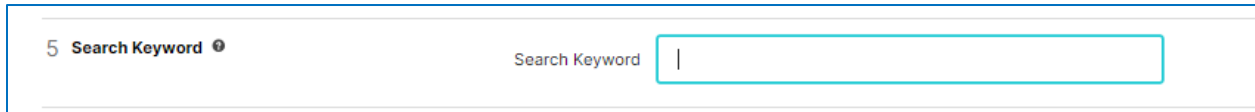
A screenshot of a web interface showing a search field. On the left, there is a label "5 Search Keyword" with a small circular icon. To the right of the label is the text "Search Keyword" followed by a rectangular input box with a vertical cursor inside.

Figure 30. Demonstrating how to enter various keywords if desired

10. **Choose File Format:** Select between .csv or .XML file formats.

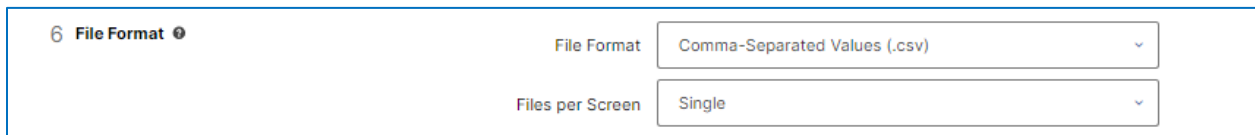
A screenshot of a web interface showing two dropdown menus. The first menu is labeled "6 File Format" and has a dropdown arrow. The selected option is "Comma-Separated Values (.csv)". The second menu is labeled "Files per Screen" and has a dropdown arrow. The selected option is "Single".

Figure 31. Demonstrating how to select the file format

11. Click "**Run Report**" in the upper right corner of the screen to generate the report.

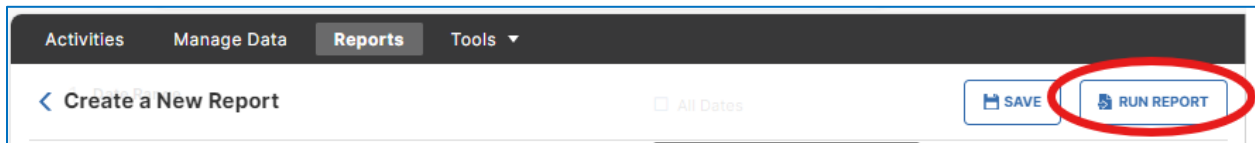
A screenshot of a web interface showing a navigation bar with "Activities", "Manage Data", "Reports", and "Tools". Below the navigation bar, there is a section titled "Create a New Report" with a back arrow and "All Dates" checkbox. In the upper right corner of this section, there are two buttons: "SAVE" and "RUN REPORT". The "RUN REPORT" button is circled in red.

Figure 32. Demonstrating how to run the report to export the data

# Creating Custom Report

Activity Insight/Faculty Success (AI) allows College and Department Administrators to create custom reports using Self-Service Reporting tools. These custom reports are flexible by allowing users to add and reorder sections and maintain complete control over the formatting, filtering, and grouping of activities within the report template.

Note: If you have a reporting need that would be best fulfilled by building a custom report, you can submit a Custom Report work request to the AI team, which would help guide you in testing and validating the report to ensure that the report meets your department/college needs and specifications. Generally, these requests should be made outside of the annual review season.

## Purpose

These features enable AI college/department administrators to use Self-Service Reporting for purposes of responding to requests for specific information, reviewing data for missing or inaccurate information, and standardized reporting to specific audiences (e.g., department chairs, associate directors, provost office).

## How to Create Custom Report

1. In Activity Insight, click "Reports" at the top of the page.

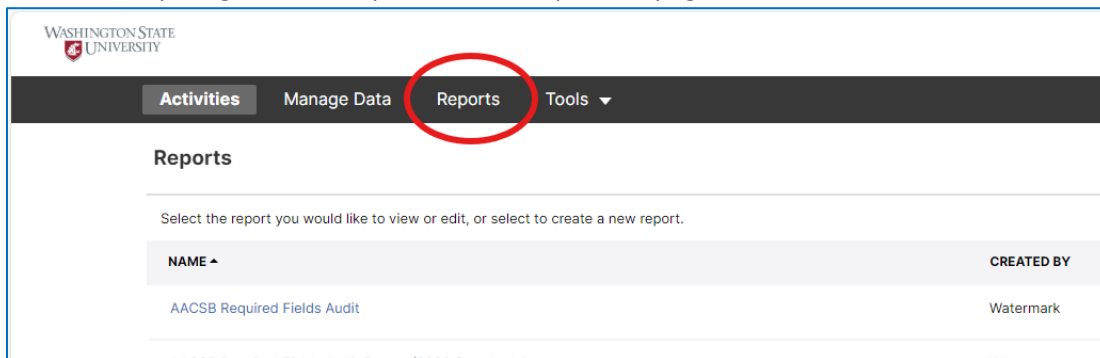


Figure 33. Demonstrating where to find the Reports page

2. Click on "Create a New Report."

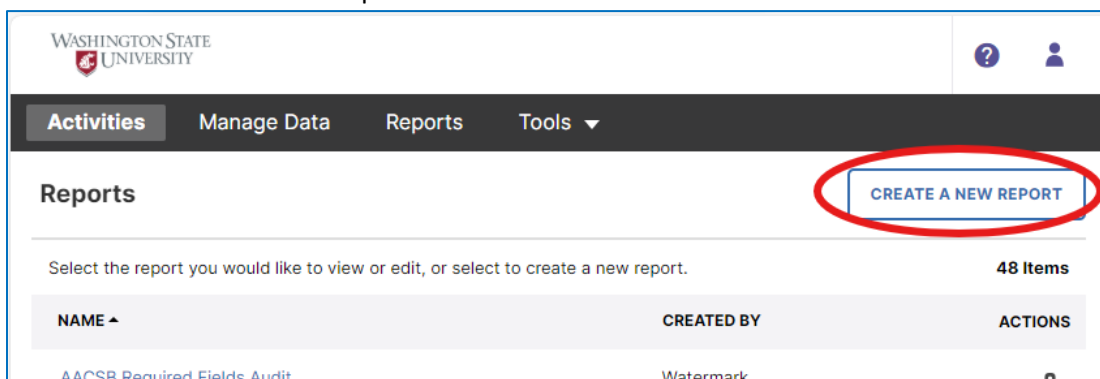


Figure 34. Demonstrating where to click to create a new report

3. Select **"Blank Document."** Depending on your security role, you should see the three options below. Choosing the blank document helps you to create a custom report on specific activities in AI.

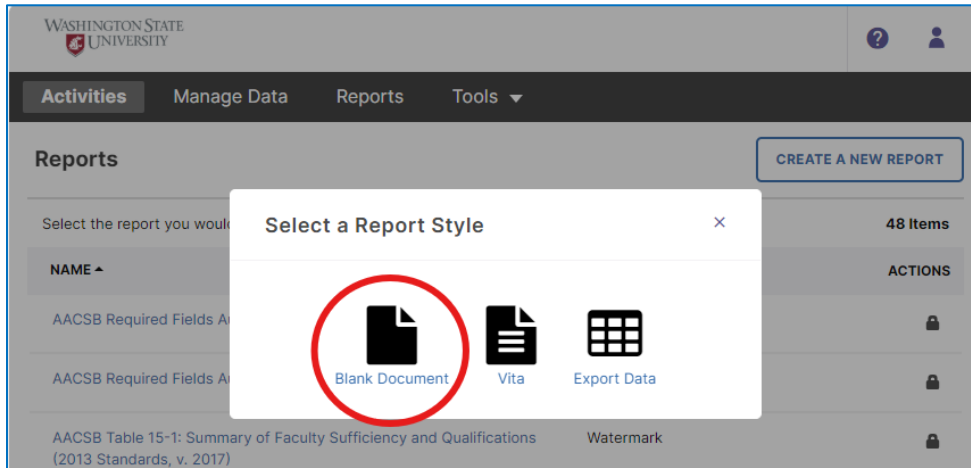


Figure 35. Demonstrating where to click to start a black report document

4. Click **"Options"** in the top right corner.

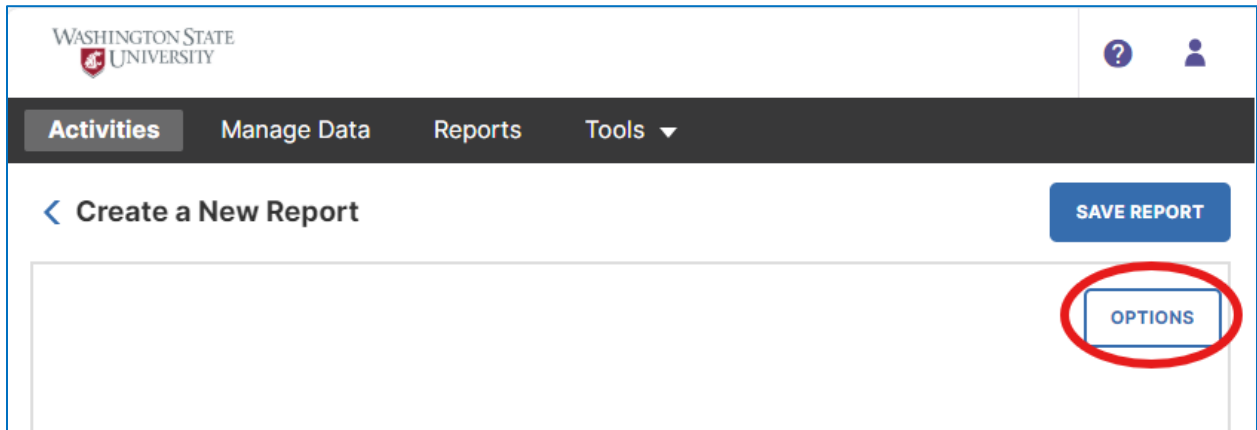


Figure 36. Demonstrating where to click to find the report Options

5. Select **"Preview As"** to build tailored templates for your report.

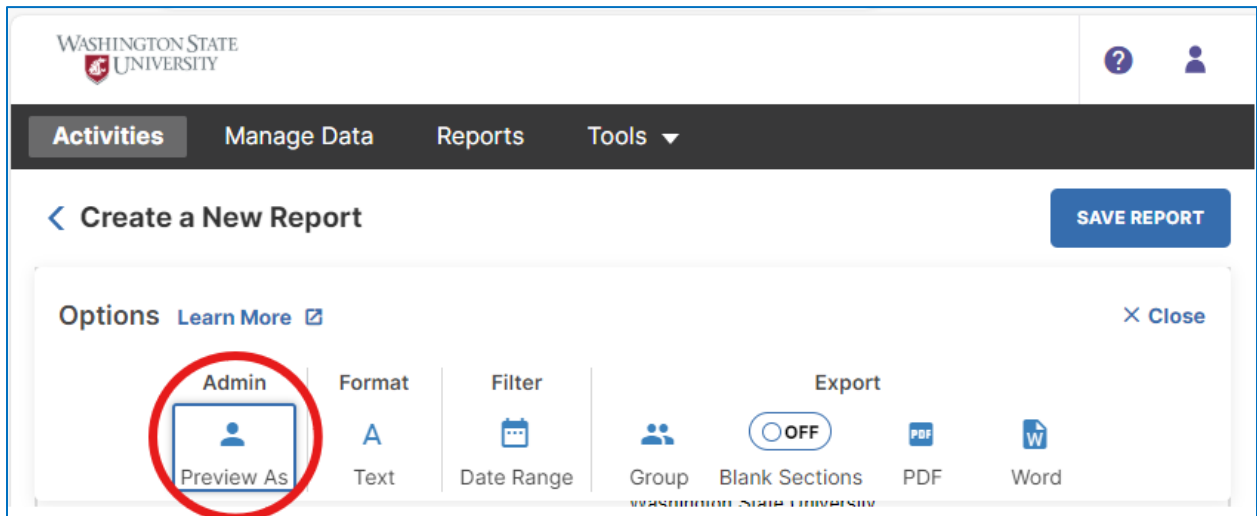


Figure 37. Demonstrating how to preview the report

6. Choose any faculty within your college or department to generate a sample report, then click 'Apply.'

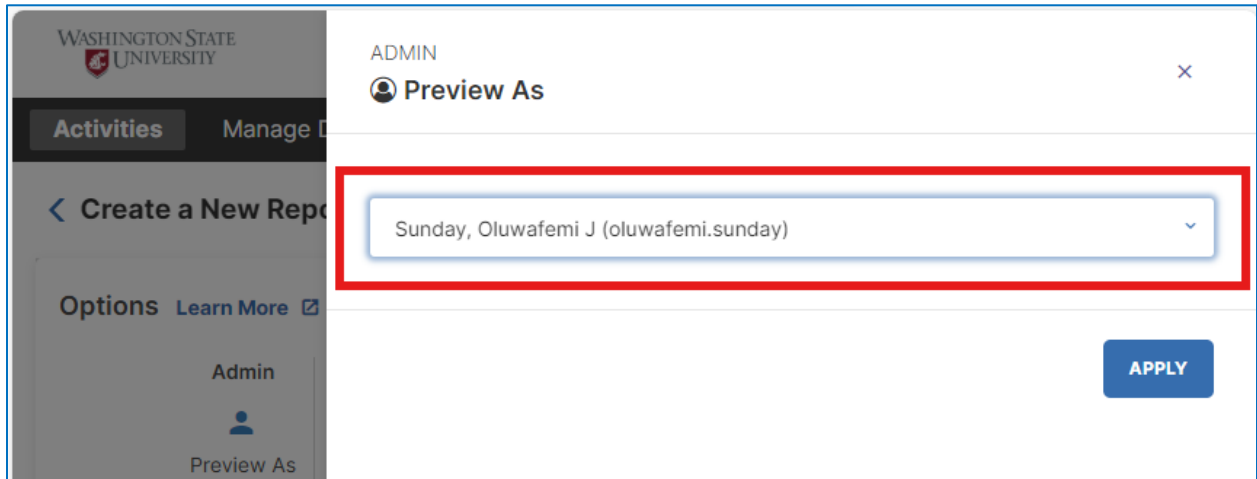


Figure 38. Demonstrating how to select an individual to preview the report as them

7. Type an appropriate heading for the new Section under "**Section Heading.**" Select the heading type for the Section heading by clicking the dropdown button in the top left corner. Click "**ADD ACTIVITIES**" by selecting the "Activity Type" from the dropdown button. Once you have selected the Activity type, you can click on the checkmark in the right corner to complete the activity.

Note: you can add text to make it more explanatory, and also you can delete this Section by clicking on the delete button. Click "**ADD SECTION**" to begin another section.

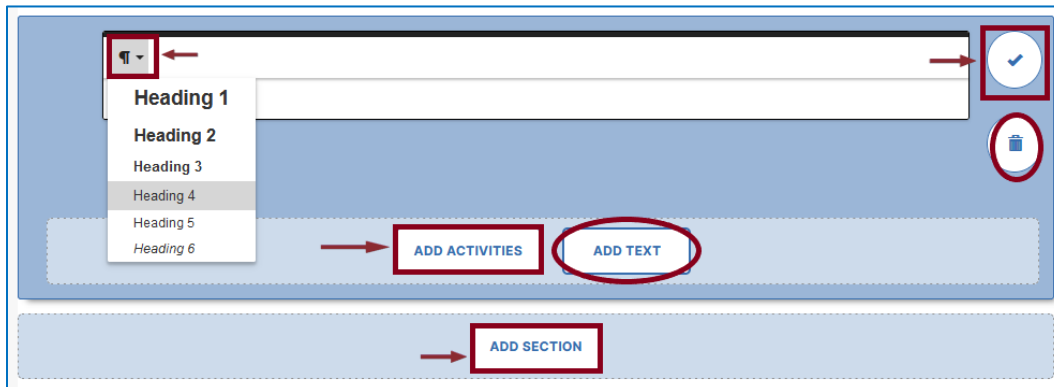


Figure 39. Demonstrating how to edit the elements of the report

8. Let us as an example add 'scheduled teaching' to our report. First, click on "**Add Section,**" then click the "**Section Heading.**" Once you have entered your desired section heading, then you can click on "**Add Activities.**"

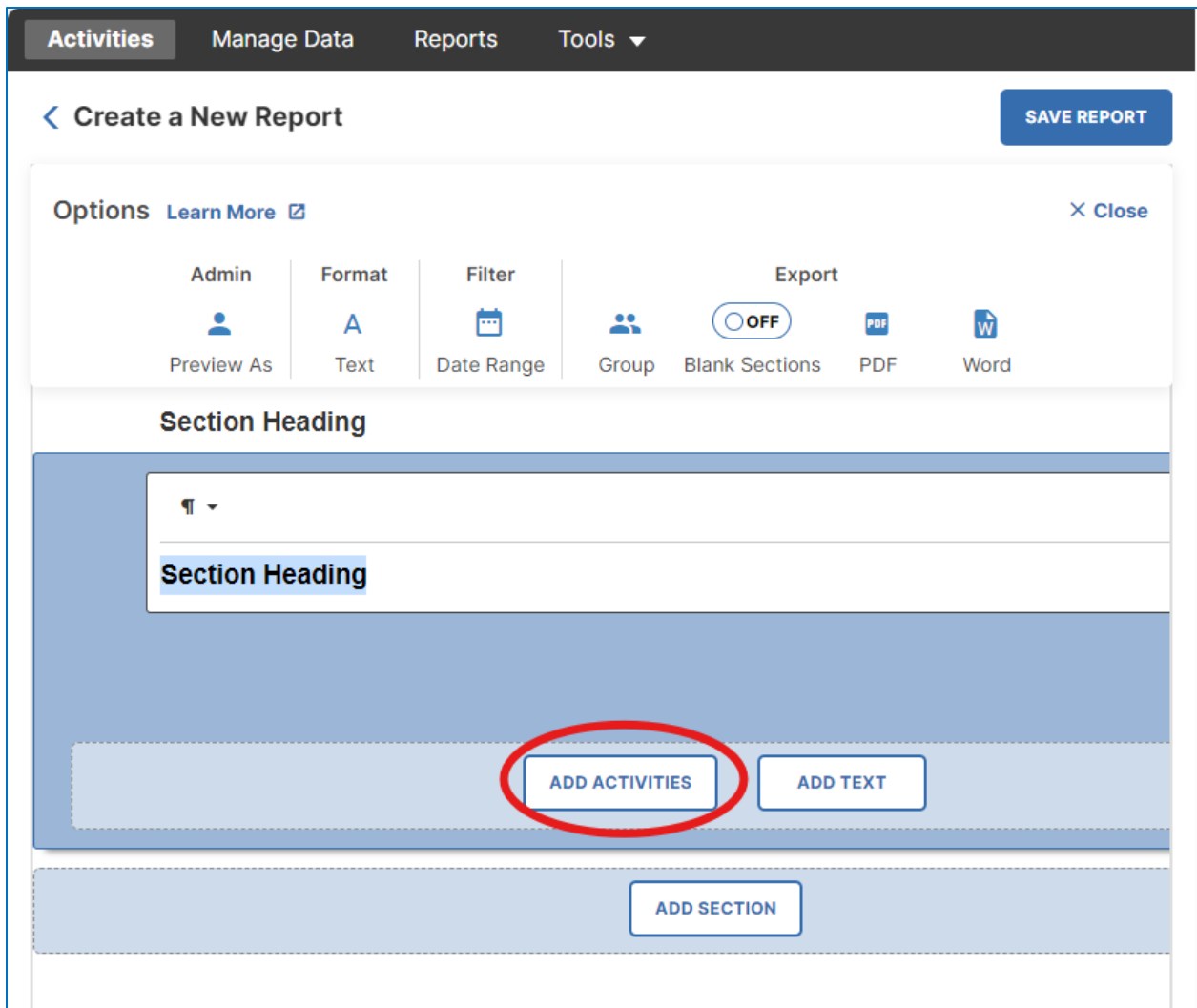


Figure 40. Demonstrating how to add a new activity to the report

9. Click on the "**Activity Type**" dropdown menu button to select the activity for your reporting. In this example, we want to report on scheduled Teaching and publications.

Note: You can begin typing the section you are looking for to find it quicker.

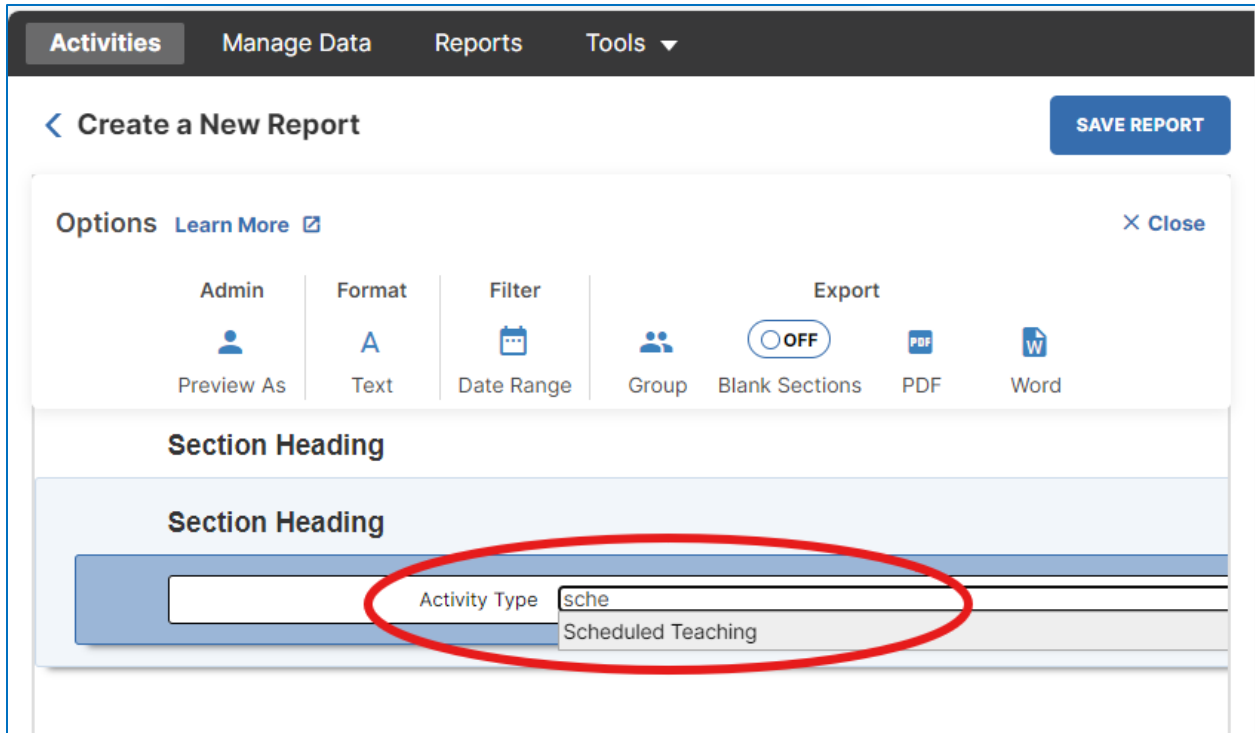


Figure 41. Demonstrating how to find various activity types

10. Click on the checkmark on the right to populate the scheduled teaching information.

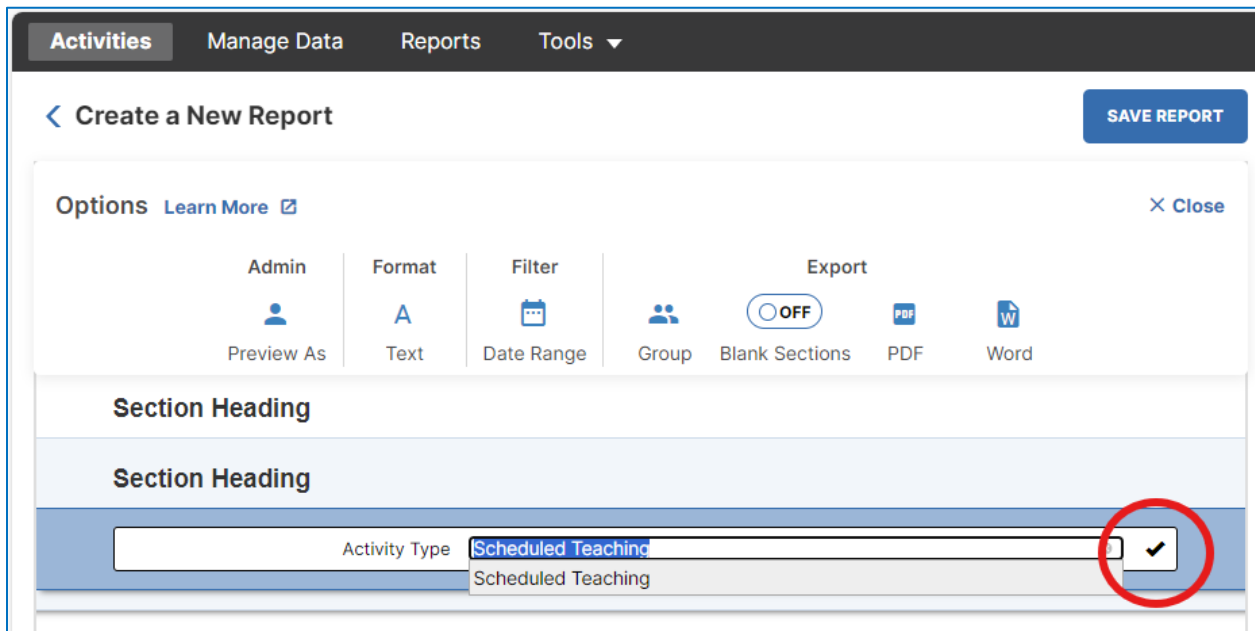


Figure 42. Demonstrating how to populate the scheduled teaching information

11. At this point, you can add formatting to this Section by clicking on the scheduled teaching block. You will then see a toolbar with formatting options provided, including *display style*, *table*, *filter*, *group by*, and so on. To create the scheduled Teaching in a tabular form and group the information, click on "Table" and tick the boxes you would like to display in your report. After you have ticked the boxes, click "APPLY."

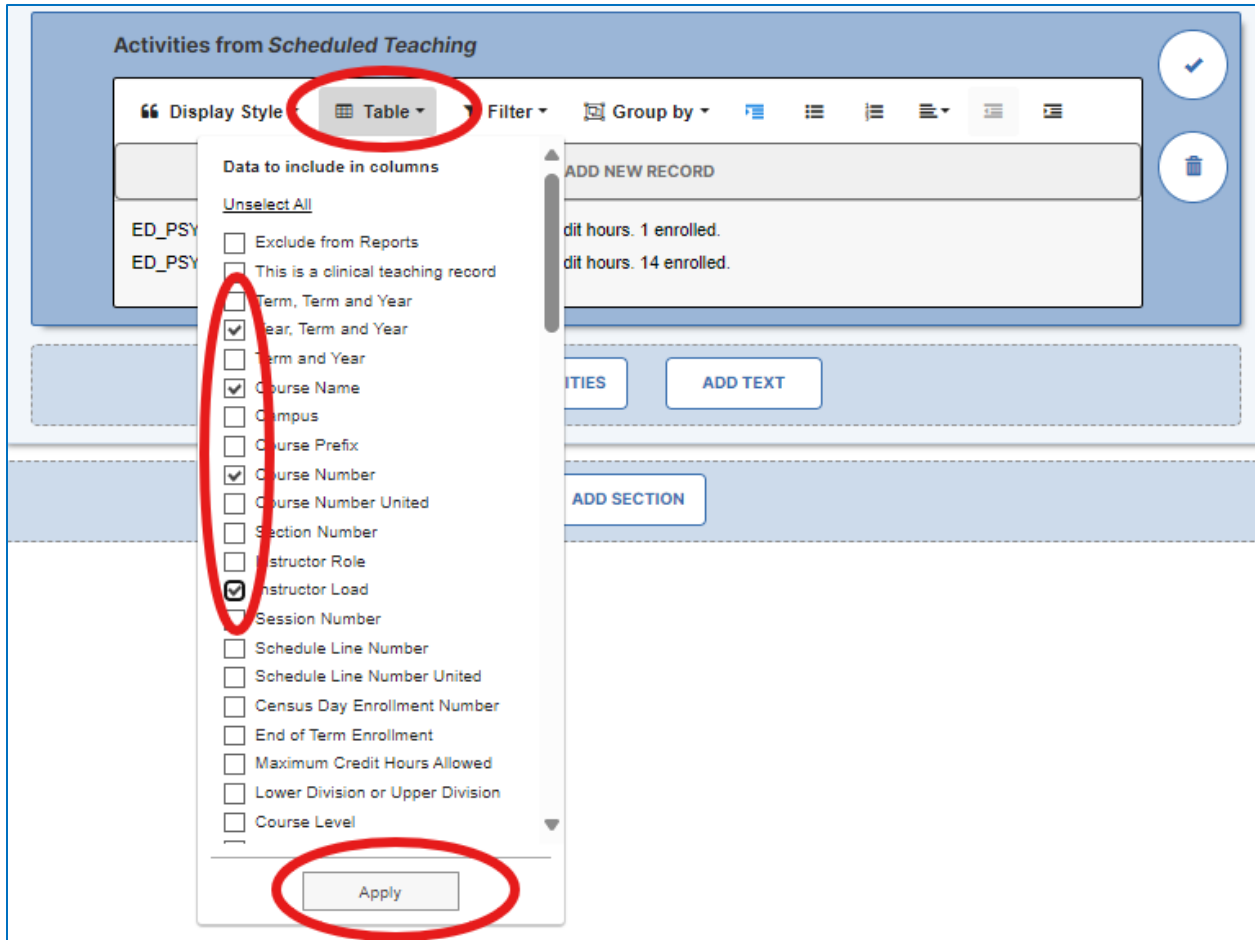


Figure 43. Demonstrating how to customize the table display

Once you click on apply, the information will be put in a tabular form, as seen below:

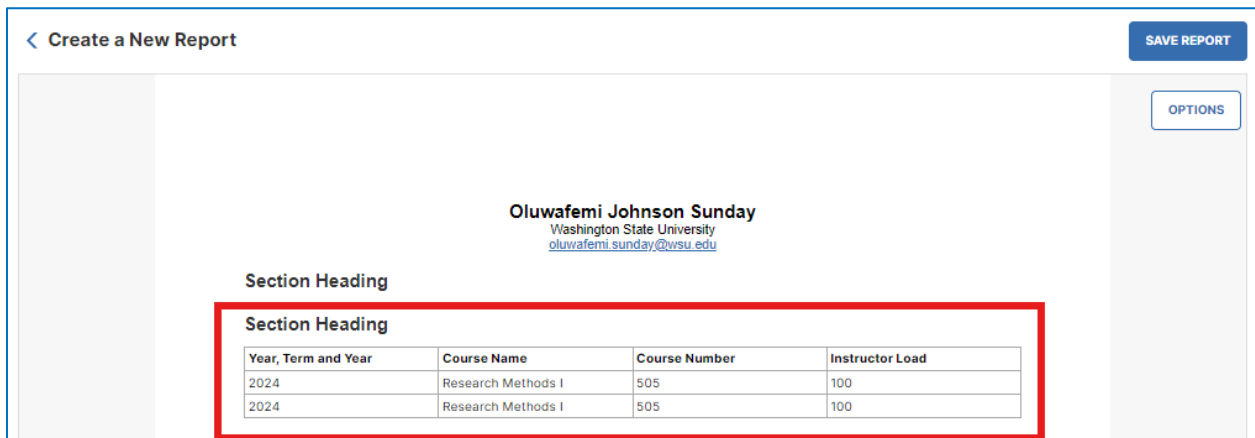


Figure 44. Demonstrating how the table will be displayed in your report

12. Then if you choose, you can then apply filters to an the table generated above. First, click on the table you want to filter. This will show a toolbar with a "Filter" option. Expand this menu by clicking on the dropdown option. Then select and check the boxes next to the filters that you want to apply, and click "Apply" when done.

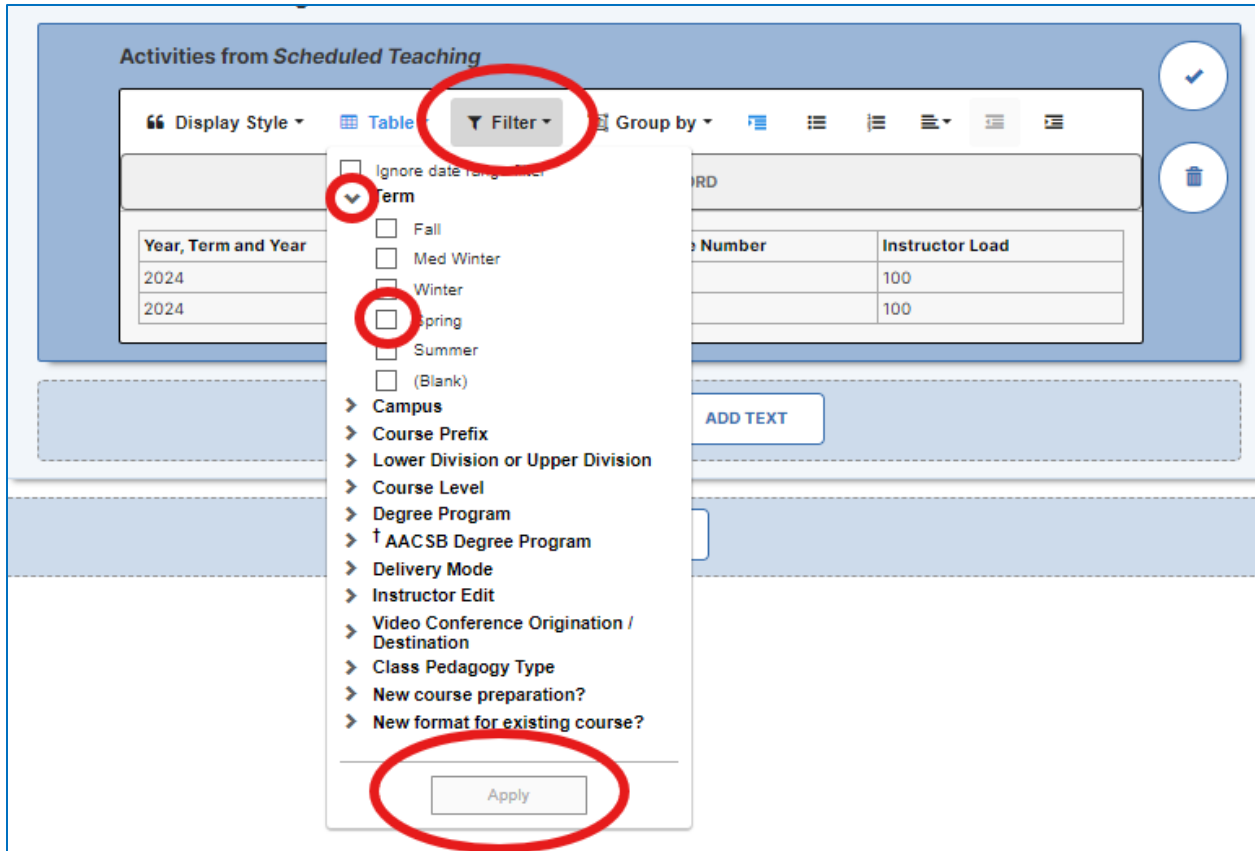


Figure 45. Demonstrating how to apply various filters to your table

- You may also want to change how activities are grouped within a section. To display how records should be grouped, click anywhere on the activities to bring up the toolbar. Click the "**Group by**" dropdown button to select a field. This list is based on the dropdown list fields available for a given screen.

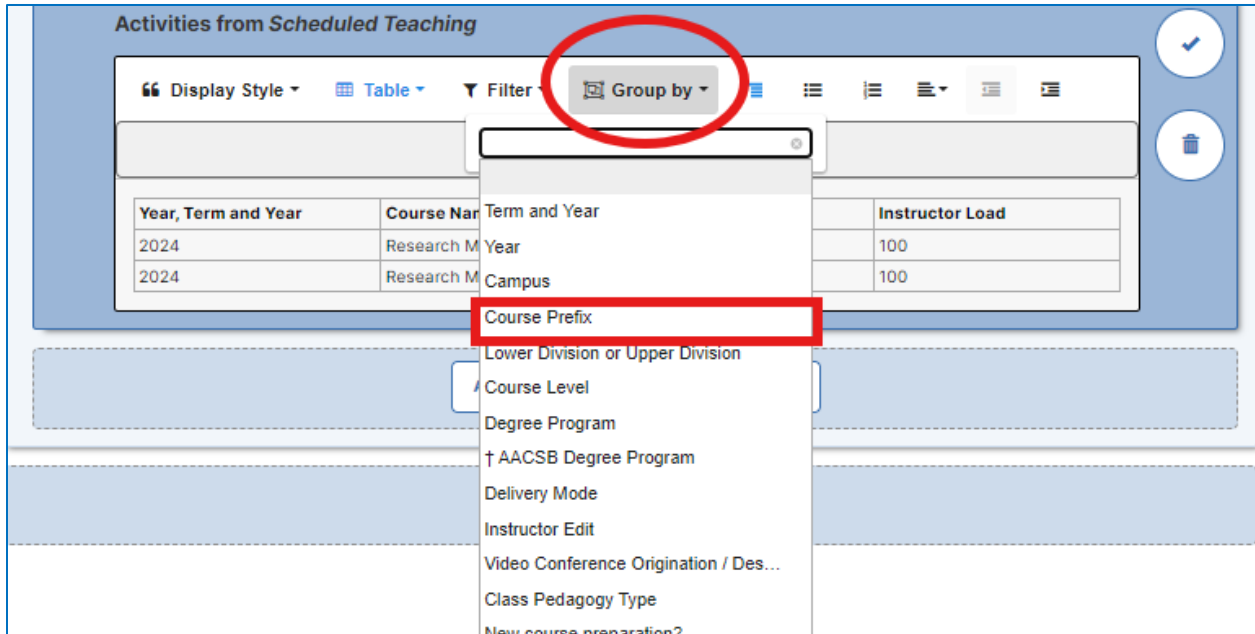


Figure 46. Demonstrating how to group the table by various groupings

- You may also add Text Sections to any section of your report when you need to include subheadings, annotations, or a summary of your activities. To do this, click on an existing section and select "**ADD TEXT.**"

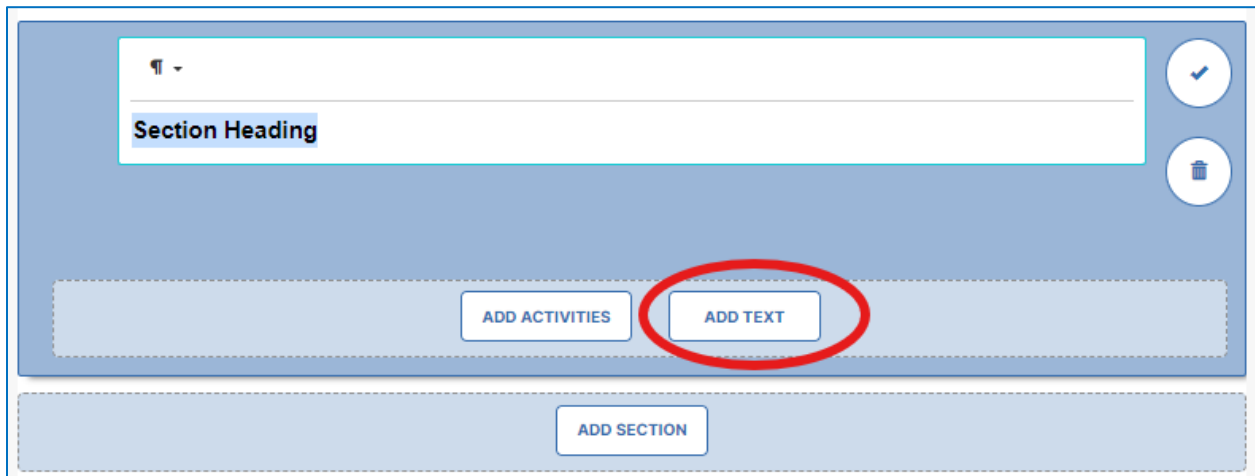


Figure 47. Demonstrating how to add text to the report

A free-text box will appear for you to add any appropriate notes. Rich text formatting options like bold, underline, and italicized are available. Once you are done inputting new text, click the checkmark icon in the circle. (See below).

Note: Text Sections should not be used to enter activity records that do not appear in an Activities Section.

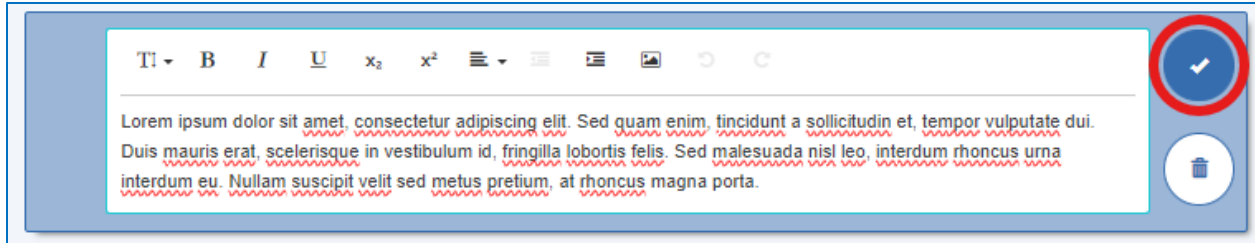


Figure 48. Demonstrating what to click to add the text to the report

15. You can adjust the date range for your report. In the top-right corner of your report preview, you will see an Options tab and be presented with additional buttons.

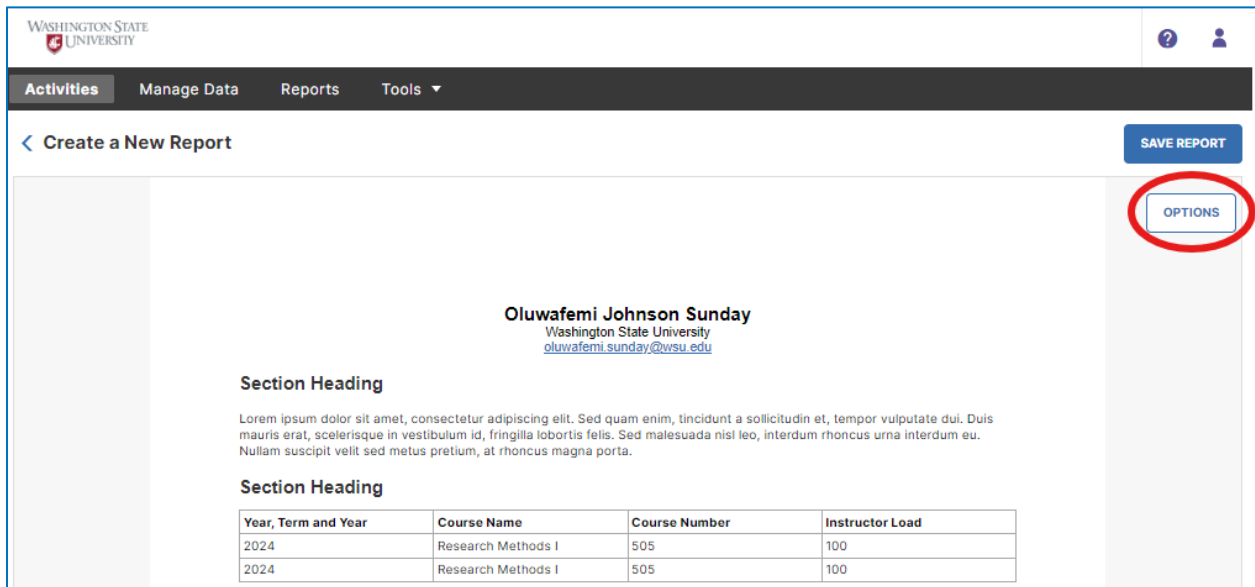


Figure 49. Demonstrating how to change various settings, such as date range, by clicking on options

16. Click "Date Range," which displays a pane with the following options:

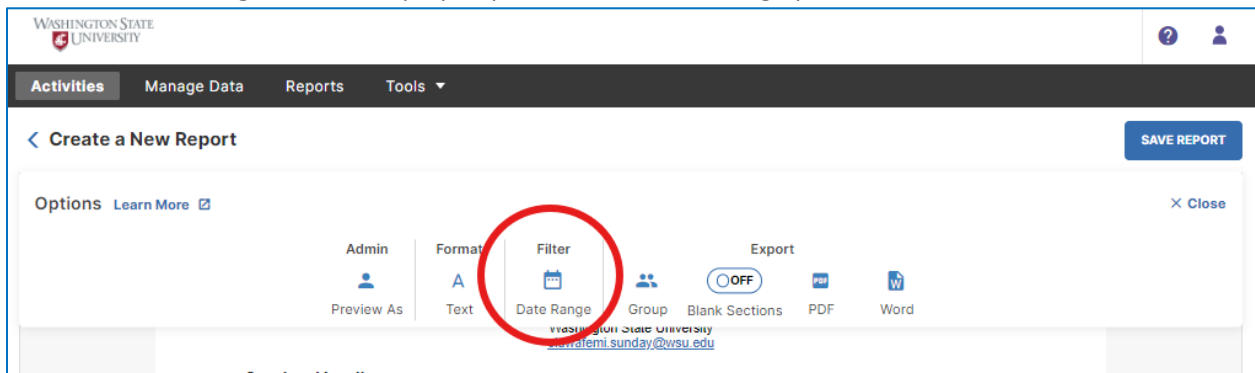


Figure 50. Demonstrating how to filter by date range

17. All Dates (default): This selection will include all of your activities from Activities. Uncheck this checkbox to set a custom date range. The Start Date and End Date option allows you to define a specific date range for the report.

Note: You can choose whether to include activities that do not have a date entered.

Finally, after entering the date range for your report, click **"Apply."**

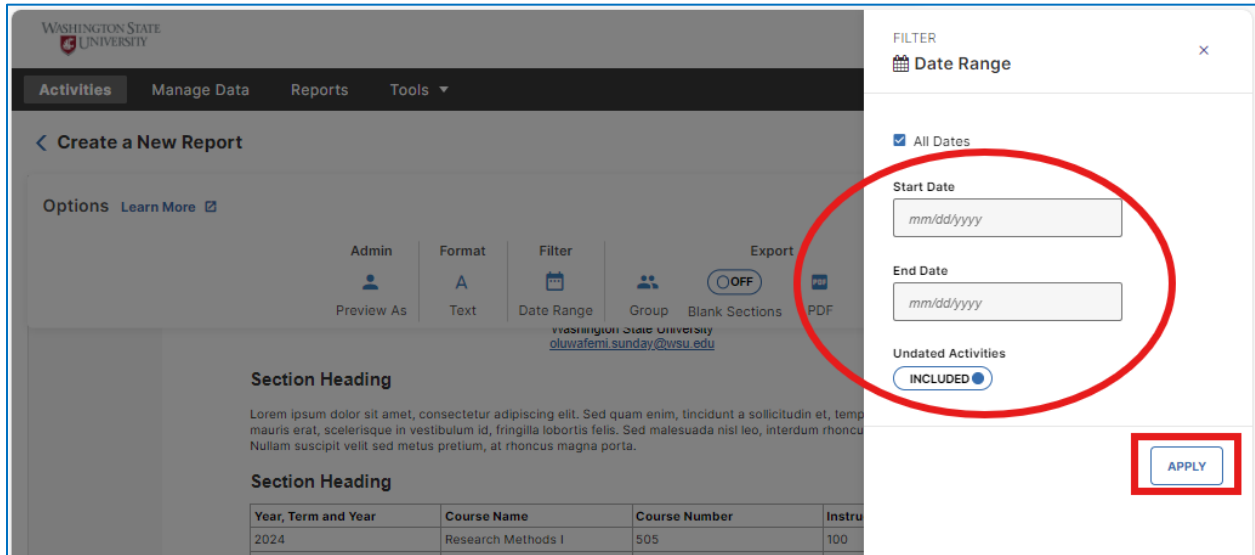


Figure 51. Demonstrating how to select the date range

18. Once you are finished formatting your report, click **"SAVE REPORT"** in the top-right corner of the screen.

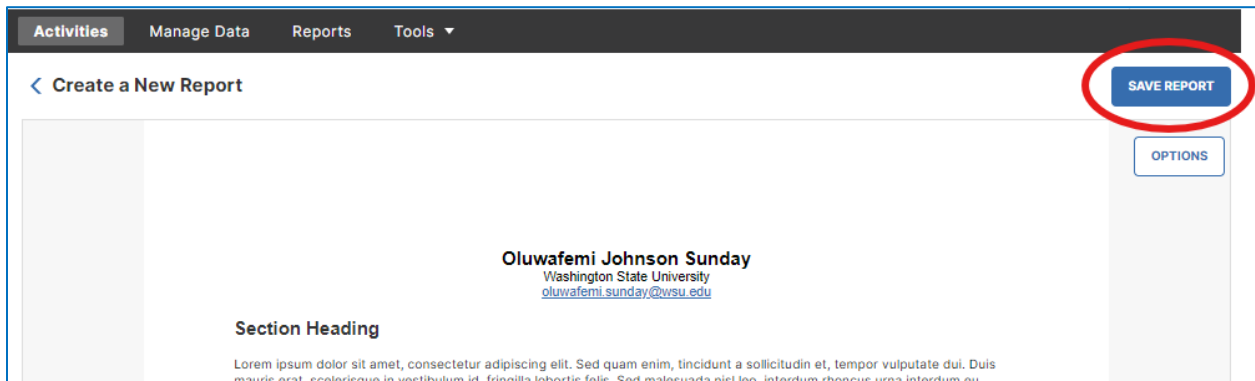


Figure 52. Demonstrating how to save the report

19. Name your report in the pop-up window and select the **"SAVE"** button. All saved reports must have a unique name. If you attempt to save a report with a name currently used by any custom report or any report you have already saved, you will receive the error message *"You already have a report with this name. Enter a unique name to save this report."* Names do not need to be unique across users, but they cannot be shared with any custom report, even if it is a custom report to which the user does not have access.

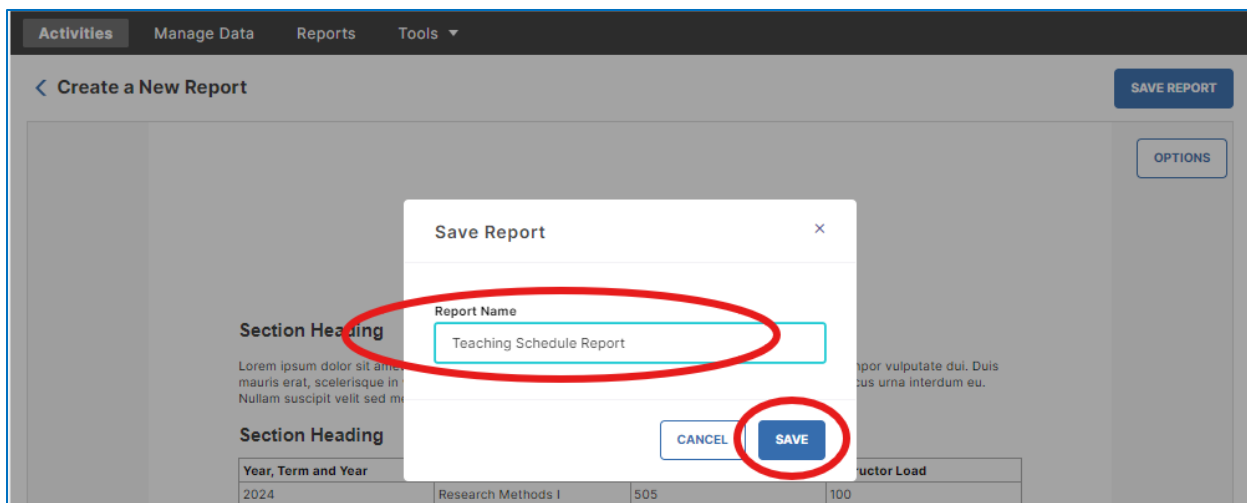


Figure 53. Demonstrating where to enter a name for your report, and how to save

Your saved report will appear in the Reports dropdown list along with other custom reports to which you have access in the Reports section. You can export a copy of the report by clicking on it. Once you have built a report template, you can use that template anytime to run a report.

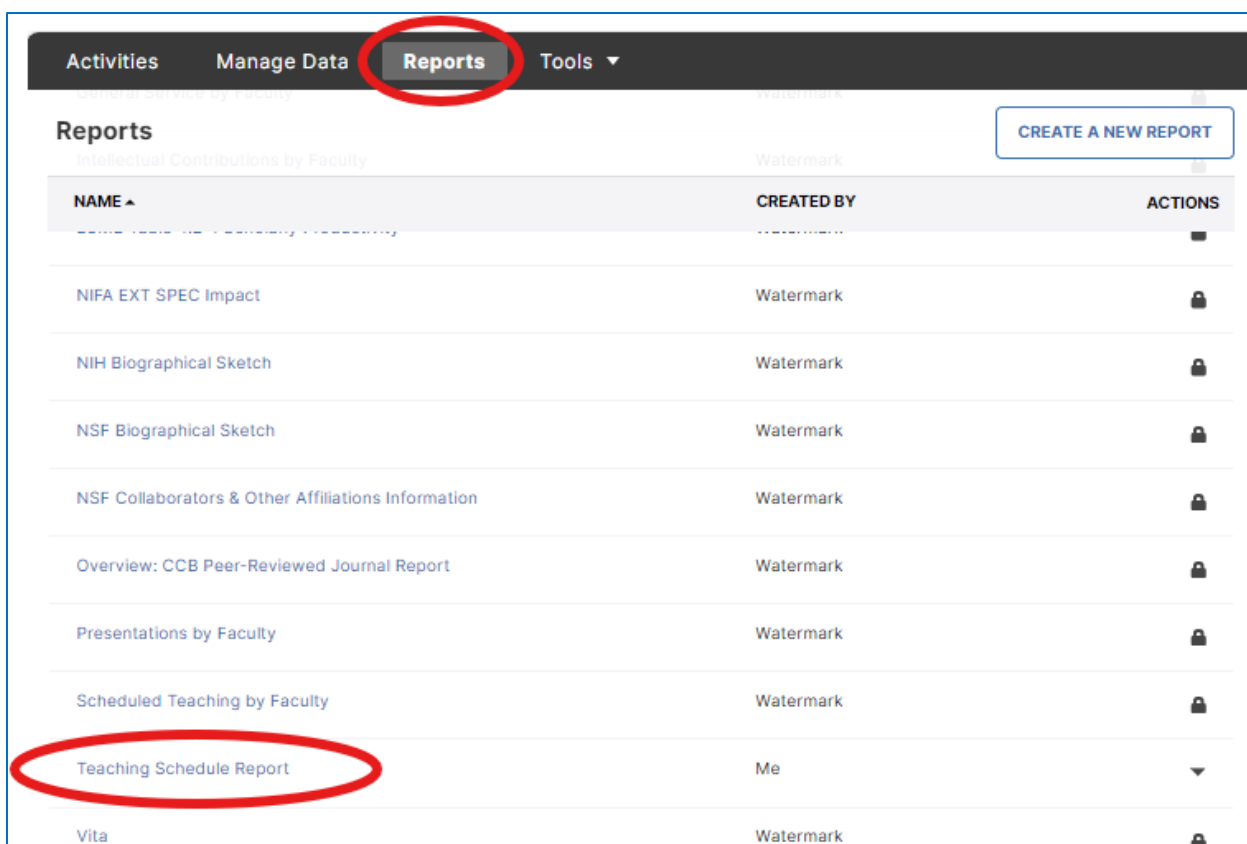


Figure 54. Demonstrating where to find your newly-created report

Note: Each time you open the report, your previously saved settings, ordering, filtering, and grouping will be intact, but it will refresh with any records or updates that have been entered in the AI screen.

20. To export the report, open the Options tab within the Report Builder. In the 'Export' toolbar section, select the desired file format for the report, either PDF or Word.

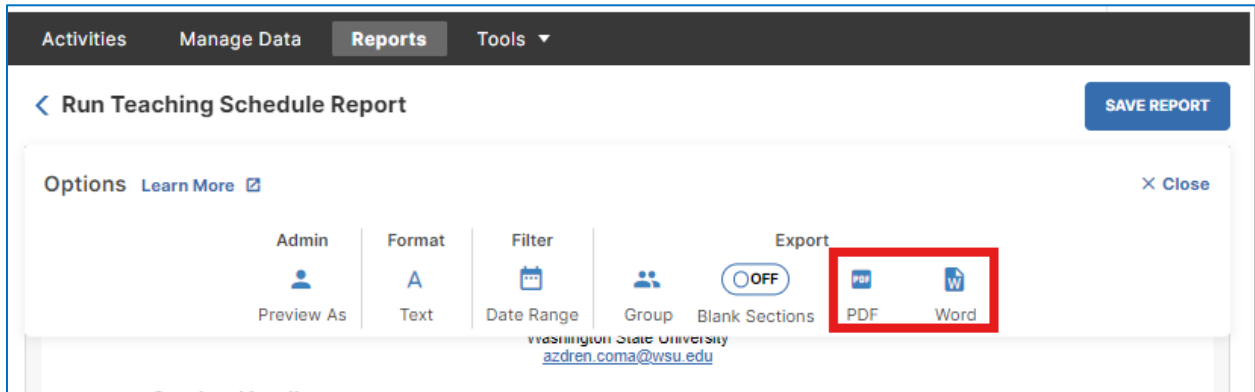


Figure 55. Demonstrating the various formats the report can be generated in

21. You can Duplicate, Delete, or Rename the Report Template by selectign the drop-down menu at the end of the report in the list of reports.

Note: Only the creator of a report can choose to delete, duplicate, or rename

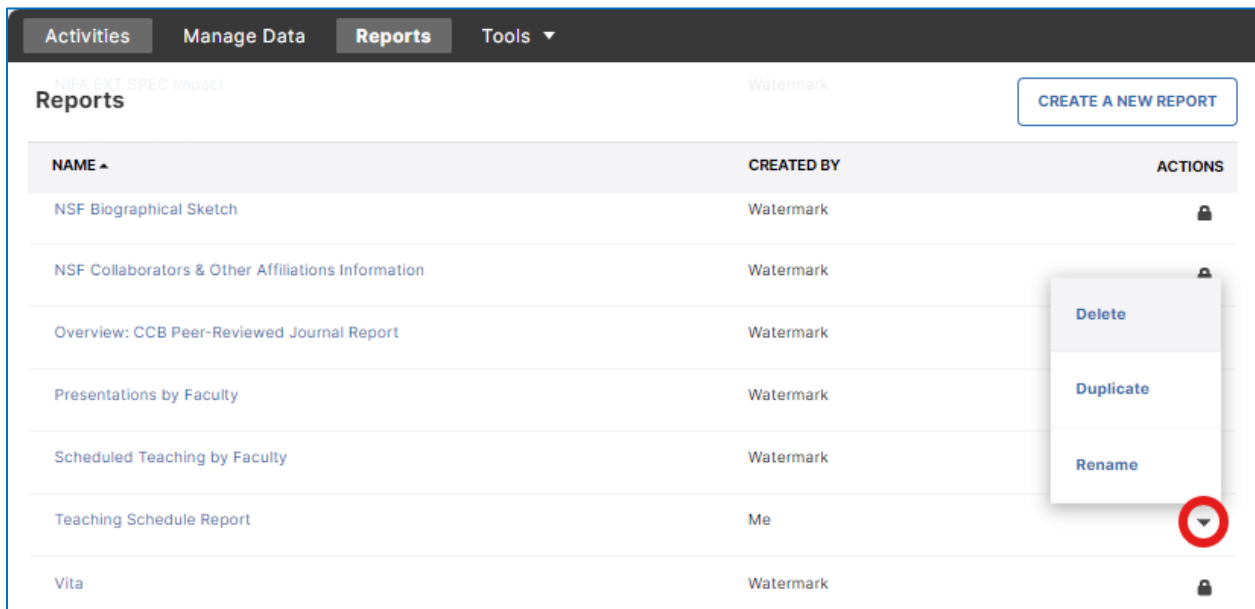


Figure 56. Demonstrating how to Duplicate, Delete, or Rename a report template

22. You can share the Self-Service Report with Other Users. This feature is accessible to Administrators based on the security roles assigned to them. For those with access to share, the "Share" icon is embedded on your screen. Users with whom you share the self-service report can open the report and view the criteria and different fields/options selected but cannot edit any parts of the reports except the date range.

To share the report, click "Options" for your report, then click the "Share" icon under the Admin section. Lists of users to whom you can share the report will be displayed. Select the individual and click "Apply."

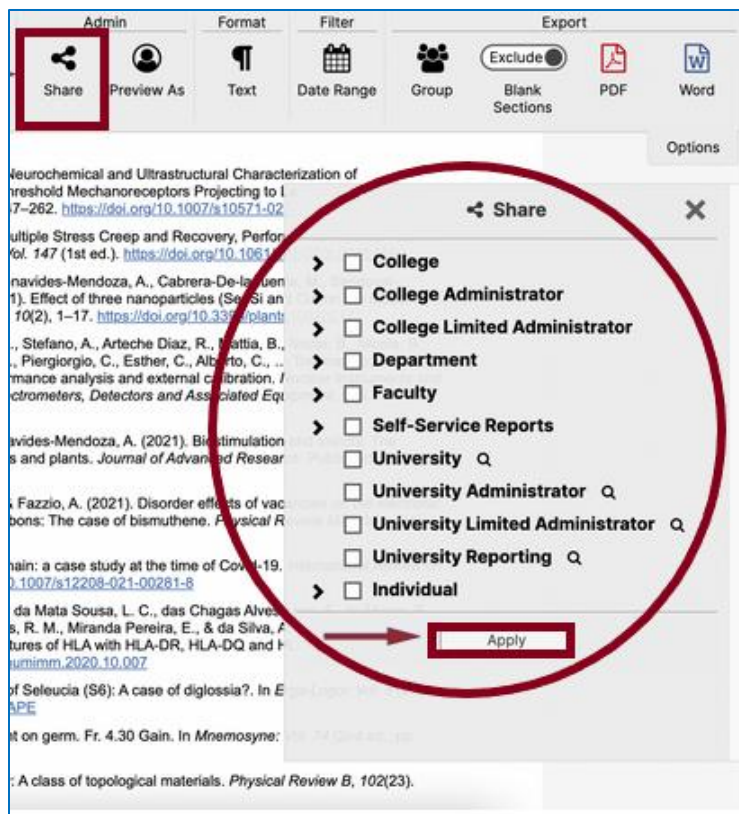


Figure 57. Demonstrating how you can select who you want to share your report with

## Account Request for Administrative Access

You can request access for faculty/staff to carry out some activity, including managing faculty data or administrative reports, running ad hoc reports, custom reports, resource center, etc.

To request administrative access for a faculty/staff member in your unit, please request using the Digital Measures Service Desk:

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

In your request, please include the name of the faculty/staff member(s) to be added, the scope of permissions (typically a college, department or school). Generally only read access is given, but if there is a need for write access, please include it in the request.

### Permission Requirement

You need to seek approval from the departmental head or dean depending on the level of access requested.

### Submit a Request

1. **To submit a request**, click on the above Service Desk (Jira) link and select "Request Activity Insight Account."

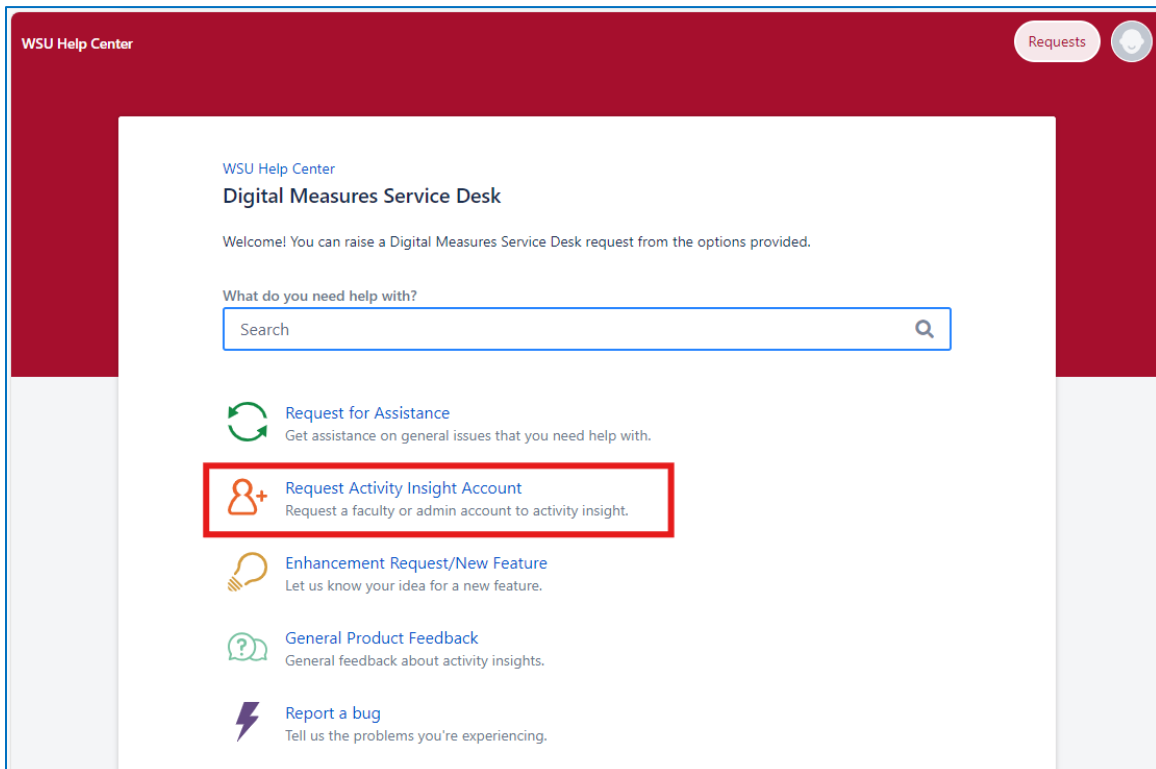


Figure 58. Demonstrating how to navigate to the page to request an Activity Insight account

2. **Enter information.** Under Raise this request on behalf of, click on the dropdown button to type the staff's name. Then fill up the requested information in the boxes as seen below. You can use the

comment box to provide additional information you think may be helpful to create the account successful

Raise this request on behalf of

Sunday, Oluwafemi Johnson

Please enter 1 more character

Employee's Name

Search for a user

Name of employee who needs access.

Employee's Department

Name of the department of the employee who needs access.

Type of Account

None

(Faculty or Admin)

If admin, your position in your unit (optional)

(e.g. Vice-Chancellor, Dean, Assistant to the Dean)

If admin, the name of the unit, department, college, or campus for which you need admin privileges (optional)

Figure 59. Demonstrating how to select an individual

3. When you are done entering the information, click "Create" to submit the request

Search for a user

Comments

Aa B I ... :≡ @ +

Describe the business need for the request

Create Cancel

Powered by Jira Service Management

Figure 60. Demonstrating how to create a ticket