

**The College of William & Mary**  
**Digital Measures ActivityInsight™**  
**W&M Administrator User's Guide**

The information contained in this guide is meant to supplement the DMS online Resource Center.

DM implementation is a joint effort among all schools at W&M. Each school has a designated administrator.

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**NOTE:** Use of the term “college” or “university” refers to The College of William and Mary. The term “school” refers to the five individual schools (A&S, Business, Education, Law and VIMS).

## Resources

There are several resources available to assist in administration of the ActivityInsight™.

Help is available directly in the system from the Dashboard and Resource Center. The following may be of specific interest to those performing administrator duties.

- Resource Center - AI 101: Introduction to Activity Insight  
This resource center area provides information on managing users and their activities, creating work requests and reporting.
- Resource Center - AI 201: Advanced Topics
- Dashboard - Activities Database – University (listing of all screens and fields in the system)

Additional information on how the system is used at W&M is addressed in this document as well as the [W&M Faculty User's Guide](#)

## Contract Management

The Office of the Provost coordinates the contract renewal and annual contract payments with input as needed from each school administrator and dean.

## Duties of School Administrator

School administrators for Digital Measures are generally responsible for the following:

1. Managing user accounts including user creation, security role assignments and security monitoring. (cannot be delegated to others)
2. Entering and maintaining verified faculty credentials
3. Coordinating work requests to enhance the system or create custom reports
4. Providing training in use of the system to faculty and/or staff
5. Determining best course of action for inaccurate or out-of-date data in Read Only fields where the source is Banner Student or Banner HR.
6. Representing school in any college wide meetings or tasks related to DM

Unless otherwise noted, the school administrator may enlist others to assist in these duties.

# Managing User Accounts

## New User Accounts

Each school administrator is responsible for obtaining approval **and** creating a user account for new faculty or staff using the procedures outlined below:

### Approval - Administrative Users

Administrative users include those faculty or staff required to access data of other users. Creating administrative users requires prior approval of Banner data owners. Email the following information to [accounts@wm.edu](mailto:accounts@wm.edu) to initiate approval:

- Full name
- E-mail
- Banner ID number (93#)
- School
- Employee's role (i.e. faculty, administrator, graduate student, etc.).

The Banner Security Administrator will route the request to the appropriate Banner data owners and, where needed, obtain a signed Banner confidentiality agreement from the user. The Banner Security Administrator will notify you via email once all approvals and the signed agreement are complete.

Once approval is received, use the steps below to create the user account in DMS.

### Approval - Faculty Users

Faculty Users are those users that will use DMS to enter and view only their own activities. Faculty users can be established with no additional approval outside of your school. If the faculty member also has administrative needs in DMS then you must follow approval outlined above in Administrative User section.

### User Account – Create new user account

Steps for creating a new user account in DMS:

1. Select Users and Security
2. Select Add A New User
3. Enter name, email, W&M username and ID (93#) – each of these fields should agree to Banner.  
**NOTE: Do not use punctuation when entering first, middle or last name.**
4. Select Shibboleth Authentication from drop down list (relies on W&M user id/password to login)
5. In the Activities Database-University section
  - a. Check Yes if this user will have information about his or her activities stored and tracked in Activity Insight.
  - b. Select Yes for Banner HR Record? if the user has an active Banner HR job. Otherwise select No.
  - c. Select appropriate College, Department and Sub-department (where applicable)
6. Select appropriate security role
  - a. Faculty - appropriate for all faculty/staff that will access their own data only.
  - b. Other security roles are administrative and are reserved for a select few that will enter or report on data for others. Such access will not be granted without Banner access approval as described above. Each role and its privileges are described by selecting Details link on the User and Security account page. More details are available from DMS using the Resource Center - AI 101: Introduction to Activity Insight (Overview of Security Roles)

NOTE: No user should be granted a security role that includes the User Security permission without express consent of the DMS University Administrator and the Banner Security Administrator.

7. Review data entered then select Save

The user information entered will populate the Personal and Contact Information and Yearly Data screens. Review these screens for accuracy and to add any additional data to complete the screen. *NOTE: DMS automatically creates the yearly data record based on the date the new account is created. Since most new faculty accounts are created before September 1 (DMS' academic year start date), you will have to edit the yearly data record manually to display for next academic year.*

As an administrator, you have edit privileges to the Read Only fields in DMS (marked by "R"). You should only change these fields to match changes in Banner (current or planned). Otherwise, periodic updates from Banner will over-write data you enter.

### **User Account – Change existing user permissions**

Steps for changing security role an existing user in DMS:

1. Select Users and Security.
2. Select existing user name from list (or type in search option) then select the pencil (edit) icon next to user name
3. In the Edit User page, make the changes to this user's account information, selecting appropriate security role  
No user shall be granted a security role other than Faculty without the approval of the Banner Security Administrator. Additionally, no user shall be granted the User Security permission without the express consent of the University Administrator and the Banner Security Administrator.
4. Review your changes and select Save button to save changes and return to the Users and Security page.

### **User Account - changing College, department or sub-department assignments**

Once the user account is created, use Manage Data instead of User and Security to edit college, department or sub-department.

### **Terminated/Retired Users**

**WARNING: DO NOT DELETE USER ACCOUNTS.**


Data collected for terminated/retired users remains important for reporting needs of the College. Therefore, terminated/retired users will be Disabled (not deleted). If retiring faculty become emeriti faculty then they may remain active in DMS.

For steps to disabling a user account, refer to Resource Center – AI 201: Advanced Topics – Managing Users and Security.

## Security Reviews

School administrators should review user access periodically to ensure that users and their roles are still appropriate to their job duties and status. Refer to Resource Center – AI 201: Advanced Topics – Managing Users and Security.

Additionally, monthly security reviews will be performed by the university administrator and shared with the Banner Security Officer.

1. Select Users and Security Menu
2. Select  [Download All User Information \(Including Default Passwords\)](#)
3. Save File as “DM\_SecurityRoles\_MMDDYY.xlsx”
4. Using the Tab: User Information, filter out the following users:
  - a. Users with Faculty role only
  - b. DM privileges (Data Backup; Web Service)
5. Copy remaining list to new tab for analysis of those DMS users with ability to view/edit user accounts.
6. Compare to prior month’s report for any new users added or changes in security permissions. Investigate and address as needed.
7. Place copy of the review on shared drive EIS team/digitalmeasures/security reviews and alert the Banner security officer.

## Work Requests

When changes to the system or reporting are needed, work requests will be submitted to DM using the DMS-admin user account. This account is shared by the university administrator and each school administrator. This allows all work requests to be viewed by all administrators, especially important when changes may impact more than one school.

When a change does impact more than one school, the proposed change should be routed to dms-admin listserv and/or the dms-core listserv so that all interested parties may weigh in on the change.

Each work request must contain your initials/school. You will be responsible for monitoring the work request and closing the request once satisfied.

More information is available in the Resource Center – AI 101 – Utility Overview – Work Requests.

## Report Generation

Report creation and generation occurs using the Run Reports menu. Additional information on running reports is available in the Resource Center (AI 201: Advanced Topics - Advanced Reporting)

Other reporting hints include:

- Select the Data to Include  
Selecting fields from multiple screens will yield multiple spreadsheets. If the need for such a report occurs frequently, consider generating a work request for a custom report.
- Select who to include

In addition to selecting individuals or groups at [Click Here](#), you can also change the accounts included (enabled, disabled, or both).

- **Select File Format**  
Recommend csv format for ad-hoc reporting. For custom reports, select option that best fits your reporting needs (word, pdf, and html)

## **Faculty Degree Credentials - Education**

DMS is the central repository for degree credentials for any faculty with a DMS user account. School administrators (or their designee) will be responsible for entering required data into the Education Screen for newly hired faculty as well as updating new degrees earned by existing faculty. This should occur only after appropriate supporting documentation such as school transcript is verified. Central, secure reporting in DMS assists the College in the degree verification requirements and makes the information available on demand for Office of Institutional Analysis and Effectiveness and Institutional Research during accreditation reviews and other reporting needs.

Most information will come from faculty CV and/or degree transcript. Refer to Digital Measures/Education folder at box.wm.edu for institution codes/locations and terminal degree list. NOTE: Banner only allows 30 characters for institution description so it's best to do a search on several key words from the name of the university the faculty attended. If you are unable to locate the university, contact the registrar's office to request the creation of a new code.

## **User Reference Records**

Several screens make use of the DMS feature – User Reference, including:

- Artistic and Professional Performances and Exhibits - add Performers/Exhibitors/Lecturers
- Publications – add authors
- Intellectual Property - add Inventors
- Presentations - add Presenters/Authors
- Research Currently in Progress - add Collaborators

User reference allows Faculty #1 to enter the activity then simply select all collaborators. The activity will automatically appear in the records of the collaborating faculty's account. When this occurs the record displays:

Under normal circumstances, if the citation requires additional editing, the collaborating Faculty #2 would simply click on the Entered By: link to create an email to Faculty #1 to indicate the changes needed. However, if Faculty #1 has a disabled DMS account then you, as an administrator, would need to assistance with editing the record.

Option 1: If a modification needs to be made, Faculty #2 could copy the record (to become the record owner of a duplicate record), make the modifications and save that new record. An administrator would then need to go in and remove the original record from User A's account through Manage Data.

Option 2: An administrator can revise Faculty #1 disabled DMS account. The change would then appear in the record of Faculty #2.

## **Yearly Data Maintenance**

Yearly data records must be added at the beginning of each academic year. DMS defines an academic year as September 1 – August 31. Therefore, each school administrator should create their yearly records no later than August 10. This will allow the university administrator to generate a Banner HR update before the start of the new academic year on September 1.

Details on creating the yearly data records for next academic year are available in the DMS Resource Center.

NOTE: When you select the Manage Administrative Data option, you will be prompted to select an Academic Year. You should select the academic year that you want to create then select VIEW. The resulting list will display (1) red entries – these records will be carried forward to create the academic year selected (2) gray entries – disabled users – no record will carry forward and (3) white entries – desired academic year already exists so no change will occur.

## **Data Imports – Banner**

### **Banner HR**

The Personal & Contact Information, Permanent Data and Yearly data forms will be updated with Banner data. The data fields affected are noted by the Read Only indicator. The upload will occur at least once each term by the University Administrator using the Banner SWUDIGM job (HR option).

University Administrator will notify schools when the HR upload is complete. School administrators will be responsible for review of updated data. Creating a report to see the updated fields in DMS would provide a spreadsheet for review.

### **Banner Student (Scheduled Teaching)**

The Scheduled Teaching (banner imports) form will be updated with Banner instructor/course data at least twice each semester using the Banner SWUDIGM job (ST option). Initial upload occurs early in the term with updates midterm and end of term.

University administrator will notify schools when the scheduled teaching upload is complete. School administrators will be responsible for review of updated data. Creating a report to see the updated fields in DMS would provide a spreadsheet for review. The school administrator will also complete removal of courses flagged for deletion as outlined below.

### **Delete Flag – Course removal**

When updates are run, the new information is compared against data already loaded to DMS and where the course/instructor combination no longer appears in the most current download then the delete flag on the DMS Scheduled Teaching (Banner Imports) form is set to Yes. This occurs most often when course instructor changes, enrollment drops to zero or course is cancelled.

Each school DMS administrator will need to review their faculty for courses marked for deletion using the following steps:

1. Login to DMS then select Run Reports menu.
2. Select Scheduled Teaching – Courses for Deletion.
3. Follow report prompts for input data. **NOTE:** when selecting date range, fall starts Sept 1, spring starts Jan 1 and summer starts May 15.
4. Review entries to determine if it makes sense for the course to be deleted from the associated faculty member's DMS user account.
  - a. If correct – delete the course from Scheduled Teaching (banner imports) form.
  - b. If incorrect – change the delete flag to No (blank). Investigate the underlying cause of error, checking first to confirm that the correct WM user ID in the DMS security screen is correct.

## Troubleshooting

While data imports occur at the university level, each school administrator is responsible for reviewing imported information.

Where expected data is missing, the administrator should

- Confirm the faculty's wm user id, email and 93# in the DMS User and Security screen agree to Banner. The import process relies on a correct wm user id.
- Where a course is missing from scheduled teaching, confirm the course is active and has enrollment.
- The upload process relies on the user having the security role = Faculty. If the proper security role is not checked then the user is not matched against Banner data for upload.

Where inaccurate data is found, the administrator will need to take steps to ensure the source system (Banner is corrected). Failure to correct errors in the source system will result in incorrect information being uploaded to DMS again during future data imports.

Reporting needs may require that corrections be processed in DMS sooner than the next scheduled upload from Banner. It is acceptable for schools to make the changes in DMS providing the changes have already been approved by the appropriate departments. For example, someone may want to change their name in DMS but this should not be done without approval of name change documentation being approved through W&M's human resources.

## Data Back-ups

Digital Measures takes significant steps to protect our data as outlined on their website and in their Resource Center. An additional data backup option is available that allows the University Administrator to generate a local data backup to be stored here on campus. The University Administrator will periodically generate data backups of our W&M data.

The university administrator will use the access information provided by DM in the completed work request "Data Backup Setup Request".