Faculty Data Systems Team

Fall 2018 Pilot:

Analysis & Action Plan

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Executive Summary

Pilot Structure and Execution Methodology

The Faculty Data System (FDS) team began its Fall 2018 pilot project to test the Activity Insight platform in September and to investigate its usability and capture feedback for improvement. Sixty-three faculty members and thirty-one administrative staff participated in the pilot for a total of ninety-four participants. The pilot was conducted in three phases, one in September, one in October, and one in November, with each phase lasting approximately two weeks, to allow for mid-pilot modifications to be made and tested. Each phase was mostly confined to a specific set of colleges, though faculty scheduling limitations occasionally allowed for participants to schedule outside of their own college. The first phase included primarily the College of Agriculture and Natural Resources, the College of Behavioral and Social Sciences, the College of Education, and School of Public Health; the second included the A. James Clark School of Engineering, the College of Computer, Mathematical, and Natural Sciences, the College of Information Studies, and the School of Public Policy; and the final phase included the College of Arts and Humanities, the College of Architecture Planning and Preservation, the Philip Merrill College Journalism, and the Robert H. Smith School of Business. Grouping participants together by college allowed the team to develop a more comprehensive understanding of the needs of each particular college. Participants were asked to login to the platform and complete a list of tasks (see Appendix A) with no advance training so that the team could observe the ways participants would intuitively attempt to complete the tasks, which allowed the team to gain insights into which aspects of the platform are intuitive and where changes may need to be made to make the platform easier to use and more comprehensive for each department.

Results

The pilot sessions revealed seven key interest items:

1. **SIS and CourseEvalUM data are correct**
   - Overall faculty were pleased with the data they found loaded from SIS and the CourseEvalUM systems and felt it all looked correct. This confirms that these integrations are set up properly.

2. **Kuali Research award data is confusing**
   - A large number of participants were confused about the way they saw their grants represented on the ORA Managed Proposals and Awards screens. Although this is due to the way grant monies are represented in the Kuali Research system the FDS team is looking into ways to add additional information that will dispel some of the confusion caused by data on this screen.

3. **PHR appointment data is confusing**
   - Although it has been confirmed that the PHR integration is functioning correctly, the number of appointments, the presence of overlapping appointments, and
other appointment oddities on the Appointments at UMD screen was a point of confusion for the majority of pilot participants. Faculty did find that the PHR-fed Tenure and Rank screen matched their expectations. Training will need to clearly advise that this data comes from the PHR system and that the Tenure and Rank screen is more clear-cut for viewing current appointment information.

4. Users are happy with the Creative Scholarship screen
   ○ Faculty in creative fields, as well as outside of the creative fields, were pleasantly surprised by the presence of a screen tailored specifically to their needs. There is still work to be done on this screen to ensure it will be functional for all of the various disciplines, but its presence and attention to this data was a definite high point for faculty who do this type of work.

5. Publication import feature has pros and cons
   ○ The import feature was met with mixed reviews. The majority of faculty were very happy to see that it can help alleviate much of their data entry requirement in terms of publications, but its use still involves further, occasionally time consuming, curation by faculty. The FDS team is working on training materials to alleviate as much of this as possible.

6. Faculty interest in using AI data to drive web profiles
   ○ Throughout the pilot many participants expressed interest in having the data entered into AI pushed out to faculty web profiles. Enabling this functionality on the platform will help to create value for faculty.

7. Certain aspects of the product’s user interface could be improved
   ○ While most faculty were quite pleased with the straight-forward appearance, intuitiveness, and functionality of the platform, there are still some areas for potential improvement from a user experience standpoint. The FDS team is working in partnership with Digital Measures to mitigate these issues.

Overall the response to the platform has been overwhelmingly positive. Faculty have found it to be quite straight-forward, easy to navigate, and comprehensive for their needs. A number of faculty are pleased that they will be able to access the system at any time and add activities as they complete them; this will eliminate their current ad-hoc methods for keeping track of their achievements. Two primary concerns raised regarding implementation were a desire to have clear instructions for which data faculty will be required to enter right away and in which order, and clear instructions for which screen to enter each type of activity. The FDS team intends to fully address each of these areas in training sessions and documentation previous to roll out.

Summary of Training Opportunities and Configuration Changes

Training Opportunities

● Ensure that training and communications to users clearly articulate expectations around use of the platform, and explanations of how the data will be used.
● Emphasize the role of dates within Activity Insight and reporting.
● Guide faculty on the benefits of the Data Curation/Quality Report, once it is created, which highlights the records without dates so that they can update them for better reporting success, and improved ordering of entries on all summary screens.
● Emphasize use of "duplicate" and "pasteboard" options.
● Be clear that, although Course Evaluation data in Activity Insight does not appear in the same table format as the annual activity report, it will be presented that way in annual activity reports run from the platform.
● Be clear that data provided through integrations is not able to be edited by users.
● Develop materials to guide faculty in the use of the publication import features and clearly outline the pros and cons of each option, including which platforms will provide DOIs for their publications and which will require them to be filled in manually.
● Create a list of instructions and best practices to help faculty curate their data for import to the Publications screen.
● Update existing publication export LibGuide to mention that the file extension could change when using Safari.
● Be clear in documentation that it is not currently possible to import subscripts and superscripts into publications, and advise ways to enter information without this ability.
● Add "publications showing up in the Other section of reports" to an FAQ outlining frequently asked publication import questions.
● Be clear in training that the UMD Vita generates faculty achievement information in the recognized UMD Vita template's format. Update the report configuration to skip generation of empty sections.
● Be sure to emphasise the importance of putting in one record per activity, rather than one record that covers multiple activities. Ensure training materials direct faculty to create activity entries for each set of dates and each role so that all of their activities will be counted rather than lumped together.
● Provide explanatory materials to help Extension faculty with the External, Community, and Other Service screen.
● Develop instructions for administrative users on the use of the Manage Data interface.
● Develop training material guiding faculty in report generation.

**Configuration Changes**

Configuration Changes already implemented:

● After further consideration and discussion with the Core Team it was determined that the References screen was not necessary. This screen has been removed.
● Advising screen names have been updated to "Research Advising" and "Curricular Advising" to better differentiate between advising types.
● Updated Research Advising summary screen to organize advisees by last name.
● “Curricular Advising” was moved to the Teaching section to make the screen's purpose more clear and to further differentiate it from research advising.
• Removed the data field “Number of Post-Doctoral Students Advised” from the Academic Advising screen.
• Changed the wording on the Academic Advising screen from "Students advised under other circumstances" to "Number of Other Students Advised."
• Added "Undergraduate Students Advised" to the Curricular Advising summary screen.
• Added an option to select Advisor or Co-Advisor on the Research Advising screen.
• Updated the set of Roles on the Research Advising screen to reflect campus needs.
• Reconfigured the publication import feature to skip automatic collaborator linking.
• Changed text on the left side of the Import Publications screen from black to blue.
• Changed record links from black to blue on ORA screens.

Changes needed/suggested:
• Create a launch screen for the platform.
• Communicate with Digital Measures to correct photo upload errors occurring on the Personal and Contact information screen OR remove this option until it is needed.
• Update the help text on the summary screen for Appointments at UMD to read, "You do not have access to modify the fields on this screen. Data on this screen are provided through the PHR system. If changes are needed, contact your unit's PHR Coordinator."
• Consult Core Team/Advisory Board to determine whether a Terminal Degree indicator should be added to the Educational Background screen.
• Create a Data Curation/Quality Report for faculty to use that will highlight the records without dates so that they can update them for better reporting success, and improved ordering of items in the summary screens.
• Screen/configuration changes:
  ○ On the ORA screens:
    ▪ Add more information regarding the Kuali Research integration in the help text.
    ▪ Add a dashboard view of all currently active ORA managed contracts and grants at the award-level (as opposed to sub-account) as a reference for faculty, free from duplication and fully listing all of their open contracts and grants.
    ▪ Discuss the faculty experience regarding viewing their grants in relation to the proposal status information with Kuali Research Team and update the help text accordingly to give an explanation for missing active grants.
  ○ On the ORA Managed Awards screen:
    ▪ Add help text to explain the Award ID/sub-account issue.
    ▪ Change the name of Sponsor Number to Sponsor Award Number.
    ▪ Add an explanation regarding the use of the Anticipated Amount field.
  ○ Improve readability for users by using available formatting options and help text.
  ○ Find all drop-down fields with only two or three values and convert them to radio buttons.
On Mentorship screen, edit drop-down list for Mentee Level to include "Visiting Faculty."

On the Course Evaluations screen:
- Add a link to the CourseEvalUM system and modify the help text on the summary screen to direct users to the CourseEvalUM platform to see the college average and student comments.

On the Publication screen:
- Add a link to a file that lists out instructions and best practices that will help faculty curate their data for import.

On the Creative Scholarship screen:
- Work with faculty to update drop-down options for Type of Work and Media Type.
- Update Collaborators section so that 1st Collaborator defaults to the user.
- Add the options, "Sound Performance" and "Other" to the Type of Work drop-down on the Creative Scholarship screen.
- Add a "Peer reviewed?" selector.
- Update the "Collaborators" note to read, "individual/firm/organization."
- Update the summary screen to show Location for each record.
- Add an indicator for "Completed" or "Scheduled/in-progress."

On the Reviews of Creative Scholarship screen:
- Add a field for page numbers.
- Update the summary screen display so that each record shows, "Review of [Work/Performance/Exhibit Reviewed]."
- Update Collaborators section so that 1st Collaborator defaults to the user.

On the Non-ORA managed Proposals/Awards screens:
- Rename the Non-ORA screens to be something that is understandable by all the schools without any prior knowledge of ORA.
- Add help text for the investigator section of the form and revisit the set of fields included for collaborators.
- Add more activity types to the drop-down on the Non-ORA form to be more comprehensive for Arts and Humanities fields.

On the Professional and Campus Service and Committees screen:
- Review screen configuration and verify need for pro bono/compensated data field on this screen. If identified as needed, provide radio button options for pro bono and compensated, with pro bono selected as default for the faculty member.
- Place the note below the date entry.
- Rephrase the information provided in the dates note to make it more understandable for users. Add default placeholders to indicate year and month entries. Let users know that they can enter the year alone if they are not confident about the exact dates.
- Consult the OPA reporting form used campus-wide and adopt the same metric for reporting time as used there. Consistently use this time metric on any screens that request time spent.
  - On the Editorships, Editorial Boards, and Reviewing Activities screen:
    - Replicate the help text from the summary screen.
    - Provide help text for the “Add Document” button.
    - Provide explanatory text for the “Role” drop-down.
    - Provide an optional input box for journal URLs.
    - Move “Role” above “Contribution Type” in the activity screen layout.
    - Provide help text for the “compensated” or “pro bono” choice.
  - On the Consulting screen:
    - Rephrase “Consulting Type” to remove the ambiguity associated with it.
    - Move the “Organization” input above “Consulting Type”.
    - Provide a help icon for the “compensated” or “pro bono” choice.
  - On the External, Community, and Other Service screen:
    - Consult with the Advisory Group to identify an appropriate screen name.
    - Unpopulate the optional input boxes in the screen.
    - Consult with Extension leadership to ensure configuration accommodates their needs, including how to incorporate their voluntary work.
    - Update the help text provided under the Collaborator section to match the existing functionality.

- For Reports:
  - Review the UMD Vita report configuration to ensure peer-reviewed journal articles populate on the report and that tagging of different screens matches with the correct screens on the report.
  - Set default dates for reports: non-annual reports cover all years; annual reports cover most recent year.

- For Administrative Users
  - Work with administrators in the Dean's office in each school to configure access in Activity Insight for chairs, directors and other administrative users to ensure that the correct PHR departments are selected for these users.

- Longer term updates related to the Publication screen:
  - Discuss with Digital Measures the possibility of implementing style changes to the Import Publications screen to help show that each side of the screen is a different type of import option.
  - Recommend to Digital Measures that an option to choose the version of the publication the user wants needs to be worked on.
  - Request a Skip All button on the duplicate review screen.
  - Recommend to Digital Measures that the skip button needs to be reconfigured on the last duplicate record to indicate that all duplicates have been addressed OR the skip option may instead take the user to a screen that says that all duplicates have been addressed.
  - Request Digital Measures to indicate mandatory fields using asterisks.
○ Request Digital Measures to default "Was this peer-reviewed/refereed?" to "yes."
○ Request Digital Measures to add numbers to the entries on the summary screen.
○ Request Digital Measure to add sort, filter, and search functionalities to the summary screen. Examples: the ability to sort by date of issue, publication title, name of first author.
○ Discuss with Digital Measures the possibility for an option to edit certain fields for multiple Publication records in one go.
○ Recommend to Digital Measures that notification alerts from citation managers like Google Scholar and Web of Science be integrated into Digital Measures in the future.

● Longer term updates related to Reports:
  ○ Recommend Digital Measures add a .docx option for report downloads.
  ○ Explore development of a report that enumerates publications.
  ○ Recommend to Digital Measures to append the faculty name/department name to the default file name for the various different kinds of reports.
  ○ Update reports so that publications print numbered.

Potential Future Integrations

● Discuss options for pushing data to faculty web profiles with the Advisory Board and Digital Measures.
● In order to lighten data entry requirements for the Research Advising screen, continue to look for ways for faculty to bulk import historical data that was not covered by the Lyterati data dump. Also, continue to seek ways to integrate with other campus systems to better achieve the goal of "enter once, use in multiple ways."
● For the Tenure and Rank Data screen, find out from PHR integration team if sabbatical eligibility can be part of the data feed from the PHR system.
● Explore possible integration opportunities with databases on student research managed by the Graduate School.
● Explore possible future integrations to import syllabi for courses from ELMS.

Pilot Findings and Feedback - Overall

At the beginning of each pilot session, faculty had a tendency to be confused by the lack of a landing page. Because there is not currently a landing page for the platform, the link in the pilot task list initially took participants straight into the CAS login and then directly into Activity Insight.

● RESPONSE: After the first set of pilot sessions the FDS team created a light-weight launch screen to be used in the next rounds of piloting. The screen mimics the Faculty Affairs web page for the project's information with the addition of a link to open the platform. After implementing this change, confusion about the login process nearly disappeared completely.
- **ACTION**: Configure the Activity Insight portal for the launch and general use to include a link to login to the platform.

In a number of sessions, faculty asked questions about expectations on their use of the system—how much data are they expected to enter in the system, when do they need to have their data entered and what will their data be used for.

- **ACTION**: Ensure that training and communications to users clearly articulate expectations around use of the platform, and explanations of how the data will be used.

Quite a few participants, both faculty and administrators, asked questions regarding the value of implementing this new system beyond the annual activity report. Pilot facilitators emphasized the ability to run other types of reporting, as well as the ability to enter information once and use it for many purposes. Many participants also suggested that one option that would create a lot of value for many faculty would be to push data from the platform out to their faculty web profiles. This is an option that has been discussed previously, as this functionality is currently available through the platform. While the option of developing web profiles had been put on hold so that the team could focus on configuration and implementation first, the interest in web profiles shown by faculty suggests it should be examined as a possibility sooner.

- **ACTION**: Discuss options for pushing data to faculty web profiles with the Advisory Board and Digital Measures.

Across all use of the platform, there were usability trends observed throughout the initial set of pilot sessions which are outlined below and fully described in Appendix B. Each issue is presented through a description of the challenge users experienced and is accompanied by a recommendation for improving the usability of the platform.

It should be noted that these test sessions did not involve any training on use of the platform. For the most part, users were successful in navigating the system with little assistance—a credit to the usability of the interface. Attention to the issues below will enhance that experience and increase the intuitiveness of the platform.

**Recognizing Link Text**

Many users throughout the first half of the pilot sessions had a difficult time determining if the text available on the menu screen was clickable or not.

- **RESPONSE**: Mid-way through the pilot the FDS team changed hyperlinked text from black to blue to delineate between regular text and hyperlinked text, as is common practice on most web sites. This appeared to completely alleviate the confusion regarding this issue.
Hints for Date Fields
A large number of users experienced difficulty when determining what the drop-down fields, and fields for dates, were asking for across screens.

- **ACTION:** Provide hints within the input fields on the type of data expected.

Cancel Clear Icon
Several users had problems with the cross button at the right edge of input fields. The cross buttons did not provide any indication of the field being a drop-down for users in our piloting experience. The cross buttons are intended to be used for clearing the input entered into the input text field, but users had difficulty getting them to function in this way.

- **ACTION:** Replace the icon at the right edge of these input drop-down fields with an icon similar to the one used with the pop-up for rapid reports.

Visibility of Active Button
Many pilot participants had a difficult time locating the Add New Item button on the Activity Summary screen, or the Save button in the activity screens.

- **ACTION:** Enhance the visibility of this button by adding color.

Record Selection on Summary Screens
While duplicating or deleting specific publications or educational background records, users were often unable to locate the checkbox available in every field at the right hand side of each row on the summary screen.

- **ACTION:** Add a different, darker color (other than light gray) to help improve the findability of the checkboxes.

Help Text and Navigation
Very few participants read available help text to help them understand what that specific screen required. Navigating between screens was difficult for many pilot participants. Many participants used the browser back button, or required a prompt from the facilitator on how to go back to the previous screen. Sometimes using the browser back button was not helpful and users would be trapped and could not navigate to the Activities or Reports screen.

- **ACTION:** Use a bold font style and/or add a different color to help direct user’s attention towards the help text on each page.

- **ACTION:** Add a breadcrumb to help the user track their progress from the home screen and to help them navigate back by using the page links on the breadcrumb.
Save Button Not Visible When Done Entering Data
Faculty members entered data into screens with many fields that required them to scroll down to complete their curation and review, and were confused by the lack of a Save button at the bottom of the screen.

- **ACTION**: Include an additional Save button at the bottom of the screen.

Date Identification for Reports
Provision of the Start date for “Run Report” caused faculty to run reports without changing the start date. The faculty assumed that the UMD Vita would contain all of their information (all dates) by default rather than it being based on a specific date range.

- **ACTION**: Set defaults for the UMD Vita and other non-annual reports to cover all years.

Radio Buttons and Checkboxes for Data Entry
For data fields with just a few options, faculty were not aware of the options while scanning the screen—they needed to click on the associated drop-down to reveal the set of possible values.

- **ACTION**: Modify activity screen configurations to use radio buttons instead of drop-down lists for data fields with only two or three options.

Pilot Findings and Feedback - Screen by Screen

General Information Data Screens

Personal and Contact Information
Although it was not part of the task list, some pilot participants reviewed the Personal and Contact Information screen out of curiosity, and a few participants viewed the References screen. Overall faculty found the personal and contact information to be complete and accurate, though some were concerned that information was missing (such as room number and addresses). A couple of users attempted to upload photos on this screen, but were unable to see their photo after doing so, or encountered errors while attempting upload.

- **ACTION**: Communicate with Digital Measures to find out why photo upload errors are occurring OR remove this option until it is needed.
References

One administrative participant who viewed the References screen expressed concern regarding their ability to see this information, and felt that it was inappropriate for administrators to have access to faculty references.

RESPONSE: After consulting with the Core Team, it has been determined that the References screen is not necessary. This screen has been removed.

Appointments at UMD and Tenure and Rank

To test the PHR system integration, pilot participants were asked to check the Appointments at UMD screen and the Tenure and Rank screen. The first of those screens was checked by faculty and administrators throughout the course of the pilot. Viewing the Tenure and Rank screen is a task that was added about halfway through the pilot. Although a portion of pilot participants found the information on the Appointments at UMD screen to be straight-forward and correct, overall the feedback was that the information found here was confusing. Once the Tenure and Rank screen task was added, we generally found that this information was a lot more digestible for users than that on the Appointments at UMD screen, and was viewed as being more accurate. Although the information provided on the Appointments at UMD screen was confusing for many faculty, overall it appears that the information coming from the PHR feed is correct and the feed is functioning properly. We did hear that faculty would like to see help text advising that the information on the Appointments at UMD screen is coming from the PHR system. They would like to see this on the summary screen as well as the screen for each appointment. We also heard from a few users that they would like to see sabbatical eligibility listed on this screen in addition to the existing data points.

- ACTION: Add help text to the summary screen for Appointments at UMD that reads "You do not have access to modify the fields on this screen. Data on this screen are provided through the PHR system. If changes are needed, contact your unit's PHR Coordinator."
- ACTION: Find out from PHR integration team if sabbatical eligibility can be part of the data feed from the PHR system. If it cannot, be sure to set expectations on the availability of this information in the training documentation.

Imported Lyterati Data Review

Lyterati data has been imported for many users to a number of General Information data screens: Educational Background, Other Employment, Professional Memberships, Continuing Education, Professional Certifications, Professional Memberships, and Professional and Extension Education. Pilot participants were given the opportunity to choose from these screens when checking the accuracy of Lyterati data already imported. The two screens most frequently reviewed were Educational Background and Other Employment. Users generally felt that the information on these screens looks straight forward and correct, but there were a number of
instances where there were invalid characters\(^1\) present on the Other Employment screen. There were also a number of faculty who did not have data on these screens, though they felt there should be data present. One particular user was concerned with the lack of a "Terminal Degree" option on the Educational Background screen, and felt this would be important for many faculty.

- **ACTION:** Evaluate data loaded into these screens to determine if data may be missing.
- **ACTION:** Evaluate data on Other Employment screen and correct invalid characters.
- **ACTION:** Consult Core Team/Advisory Board on the need for a Terminal Degree indicator to the Educational Background screen.

### Advising and Mentorship

Pilot participants were asked to review academic advising data that had been imported from Lyterati, and also add new advising data from the most recent academic year. Overall the data screens were fairly intuitive, but there was considerable confusion regarding the distinction between the Advising - Annual Academic Summary Counts screen, the Advising - Thesis, Dissertation or Clinical screen, and the Mentorship screen.

- **RESPONSE:** Seeing faculty’s confusion with the use of these screens in the early pilot sessions, the FDS team modified the screen names to "Research Advising" and "Curricular Advising" to better differentiate between advising types, and shifted their display locations on the main Activities screen. The implementation of this change largely reduced the confusion about the differences between these two types of advising in the remainder of the sessions.

### Advising - Annual Academic Summary Counts (now Curricular Advising)

A point of confusion amongst users regarding this screen in particular was the term "academic" in the screen's name. Many users were unsure of what this term was intended to mean, and some argued that everything faculty do is academic, and therefore that term should not be used. Quite a few users were unsure why there was an option to include post-doctoral students advised, due to the fact that post-doctoral students are no longer taking classes. There were also many users who were confused by the phrase, "Students advised under other circumstances," and wanted to see information clarifying what this means. Users were also concerned with the fact that undergraduate advisees, which were generally viewed as the most relevant to this screen, do not show up on the summary screen.

- **RESPONSE:** The FDS team has changed the name of this screen to “Curricular Advising” to make the screen's purpose more clear, and moved this screen within the Teaching section, to further differentiate it from Research Advising.
- **RESPONSE:** The set of student counts on Curricular Advising screen has been streamlined to cover Undergraduates and Other Students.

\(^1\) For certain chunks of Lyterati data the process of cleaning the data created invalid characters (eg. \(\notin \subseteq \emptyset \in \infty \)) within the data that was imported into AI. These have been cleaned up on any other screens where they have been found.
These changes were implemented and in place for the third round of piloting in November. Faculty found it easier to use this modified screen.

Advising - Thesis, Dissertation or Clinical (now Research Advising)

Many users who were initially apprehensive because of confusion about the differentiation between this screen, the academic advising screen, and the mentoring screen became much more confident after viewing all three screens, reading the help text for each screen, and seeing which data fields were available for each screen. However, there were still many areas of confusion for a good number of users. Although seeing many records already loaded into the screen was a point of relief for professors who have a lot of historical data, the organization of the records on the summary screen caused confusion because it is organized alphabetically by first name, which is an uncommon method of organization. Also, one user stated they would like to see students who are missing date information (from the data import) listed at the bottom, rather than listed first.

Many faculty were also confused by the options available in the Role drop-down list, some stating that there were too many, options that overlapped, and options that were unclear. In relation to the Role, some faculty wanted to be able to indicate whether their role was as an advisor or a co-advisor, as this information is important to them for reporting.

Additionally, faculty would have liked to see an integration with DRUM, Graduate School databases, or U.Achieve, or to have another way to bulk import information into this screen. Overall the form for this screen is fairly comprehensive, and faculty were happy with the ability to duplicate records and use the pasteboard option to lighten their data entry requirements.

- **RESPONSE**: As a result of early pilot feedback, the summary screen has been reorganized to list advisees by last name.
- **ACTION**: Develop and socialize a Data Curation/Quality Report for faculty to use that will highlight the records without dates so that they can update them for better reporting success, and improved ordering of advisees in the summary list.
- **ACTION**: In training documentation, emphasize the role of dates for reporting.
- **RESPONSE**: Updated the set of Role options to better reflect the roles used at UMD.
- **RESPONSE**: An option to select Advisor or Co-Advisor has been added to this screen.
- **ACTION**: Emphasize use of the duplicate and pasteboard options in training sessions.
- **ACTION**: Explore possible integration opportunities with databases on student research managed by the Graduate School.

Mentorship

Pilot participants found that, when data had been preloaded to this screen it generally looked accurate, however there was still much confusion about what "Mentorship" encompasses. Once
users discovered that this screen is for mentoring of junior faculty, many felt that this screen should also include mentoring of visiting faculty.

- **ACTION:** Extend the set of options for Mentee Level to include “Junior Faculty,” “Visiting Faculty,” and “Other.”

### Scheduled Teaching and Course Evaluations

#### Scheduled Teaching

Scheduled Teaching data for Spring 2018 has been imported for testing purposes, and pilot participants were asked to review this data and check for accuracy. The majority of users confirmed that the data looked correct and appeared to be arranged in a logical, usable way. One participant mentioned that this screen has complete information and is well represented. However, another user pointed out that it would be useful to have the syllabus included, since it is already available on ELMS.

- **ACTION:** Explore possible future integrations to import syllabi for courses from ELMS.

#### Course Evaluations

Course Evaluation data has also been loaded for the 2016 and 2017 academic years, and pilot participants were asked to review this data and check for accuracy.

The great majority of users confirmed that the information on this screen looks correct and is adequate for their needs, though some participants stated that they would like to see the data represented in an APT formatted course evaluation table. Some users wanted to see more information than what is available on the Activity Insight screen, but understood the reasoning when it was explained. Overall, those wanting easy access to their qualitative data through the platform agreed that having a link to the CourseEvalUM system would be a way to easily access the other CourseEvalUM data that has not been imported into Activity Insight. There was confusion amongst some of the participants about why there is not a comparison to college or university averages for the data points. One of the participants wanted to make a change to a course’s name, but the screen's data is locked for editing since it is provided through an integration. A few users also felt that the abbreviations for the data points are confusing and create unnecessary clutter on the Activity Insight screen.

- **ACTION:** Be clear in training and documentation that this data is presented in a more usable table format in annual faculty activity reports generated through the platform.
- **ACTION:** Add a link to the CourseEvalUM system on the summary screen and modify the help text on the summary screen to direct users to the CourseEvalUM platform to see the college average and student comments.
- **ACTION:** Be sure to be clear in training that data provided through integrations is not editable by users.
• **RESPONSE:** The FDS team has worked with Digital Measures on the display format for this screen. The data point abbreviations cannot be removed, even though they clutter the data presentation.

Research, Scholarly, Creative and/or Professional Activities

Publications

Pilot participants were asked to import some of their publications into Activity Insight through one of several import options. Many of them appreciated the team’s decision to start fresh rather than import publication data from Lyterati and were happy that there are various options, including Google Scholar, Web of Science, and ORCID.

Publication Import Feature

While a number of users found the import process to be intuitive and easy, many others found issues within the feature. Early on in the pilot sessions some faculty found that they were linked to publications they hadn't authored because other pilot faculty had used the publication import feature and had accepted the list of Activity Insight users that the platform had identified as co-authors, which caused the imported publications to show up for all linked co-authors. Also, faculty with common names were automatically linked to publications they hadn't authored. Additionally, the process of unlinking was onerous, and the incorrectly linked users were responsible for correcting the error.

• **RESPONSE:** Partway through the pilot the FDS team requested to reconfigure the publication import feature to skip the automatic collaborator linking step. Faculty are still able to manually link to their UMD collaborators’ accounts after import, but no one will be linked as an author automatically through the publication import feature. This has helped to alleviate some of the confusion encountered regarding the publications screen.

Many users felt that there could have been more guidance on the import summary screen. There was confusion surrounding the visual representation of the screen, leaving many users unaware that each side represented a different style of import (i.e. import via BibTeX or import by direct search through integration with another tool like Web of Science.) This was aggravated by the fact that the options on the left side of the screen did not look like links. Also, users felt that the different options mentioned on the two sides of the screen need to be more descriptive so that users could determine which option would be best for them. Some of the users said that, had they clicked on the Import button and then had an option to receive instructions or a guide,

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2 Please note: due to the number of issues to be addressed, this section is not formatted in the same way that the other sections of this report are formatted. Rather than one large section outlining all issues, followed by a list of actions and responses, issues will be separated out into smaller sections with their actions/responses.
it would have given them a chance to try to figure out the import functionality without needing instructions from the FDS team. While importing their publication data most of the users wanted a list of things they should keep a lookout for when curating their data. Finally, users were concerned that Google Scholar is not providing DOI when importing data while Web of Science is, as this is an important field for publications.

- **ACTION:** Develop training materials to guide faculty in the use of the import feature and clearly outline the pros and cons of each option, including which platforms will provide DOIs for their publications and which will require them to be filled in manually.
- **RESPONSE:** The FDS team requested mid-pilot to have the link text changed to blue rather than black, which helped to make it more clear that the links on the left side of the import screen are links rather than just text.
- **ACTION:** Discuss with Digital Measures the possibility of implementing style changes to help show that each side of the import screen is a different type of import option.
- **ACTION:** Add a link to a best practices guide for data curation.

Users who accessed the platform on Safari found that, when downloading a BibTeX file, the file extension changes to web archive or page source instead of .bib or .txt. This prevents them from importing the saved file into Activity Insight.

- **ACTION:** Update the existing LibGuide—which provides instructions for exporting BibTeX files for importing into Activity Insight—to explain how to handle file extension changes when using Safari.

Users found that, while checking for duplicate entries, Activity Insight shows two similar/duplicate entries but does not provide an option to choose one of the two duplicate versions to keep. It allows the user to either skip the second entry or keep both the entries. Also, currently the user needs to go through each publication individually, which can be rather tedious. Also, when viewing duplicates, users are given the option to choose "Skip" or "Import." After clicking one of those options Activity Insight saves your selection and then goes to the next record. When the user reaches the last record in the list of duplicates, choosing "Skip" doesn't cause the platform to go to another screen, it just highlights the "Skip" button and then waits for the user to select "Finish Import," but there is no indication of what is supposed to be done next or whether or not it is skipping or importing that last record. The users found this confusing as they did not know what to expect next or if the platform had frozen.

- **ACTION:** Recommend to Digital Measures that an option to choose the version of the publication the user wants needs to be worked on. Also a Skip All button on the review duplicate screen is needed.
- **ACTION:** Recommend to Digital Measures that the skip button needs to be reworked on the last duplicate record or the skip option may instead take the user to a screen that says, “All reviewed,” or something similar.
Publications Data Screen

When users attempted to edit the imported publications, they often became frustrated with the Publications data screen. After importing publication data, they would review the imported data, curate it to some extent and then save their changes. At that point, they would receive a warning that the record couldn't be saved until some required fields were updated. Users said that the form needs an * to indicate mandatory fields. It is frustrating to users to be given an error message for missing information that they were not previously requested to input.

- **ACTION**: Recommend Digital Measures to highlight mandatory fields on the data input form using asterisks.

After generating reports, users were displeased to find that their publications all said "Not Refereed." The publication import services bring in some metadata about publications but not all of them include metadata on whether a publication is refereed or not. Faculty need to update each publication manually if they want this information to be correctly reflected. Users felt this would be very time consuming. Users also want entries to be numbered on the summary screen and in reports, indicating that is the standard format, and it makes it easy for them/their reviewers to get a quick count of these activities.

- **ACTION**: Request Digital Measures to autofill the Refereed/Non Refereed field to Refereed by default.
- **ACTION**: Recommend to Digital Measures to add numbers to the entries on the summary screen.
- **ACTION**: Explore a report option that provides numbered entries for publications.

Users were also dissatisfied with the lack of sort options on the Publications summary screen. Users tried to find some of their publications after using the import feature, but could not do so using keywords and author names.

- **ACTION**: Recommend to Digital Measures that they need to add sort, filter, and search functionalities. They should include the ability to sort by date of issue, publication title, name of first author.

Users were concerned that special characters such as subscripts and superscripts were seen in Google Scholar and Web of Science but were not getting imported via the BibTeX file they downloaded from those sources.

- **RESPONSE**: An inquiry was sent to Digital Measures about superscripts and subscripts. The response from them is that it is not possible to enter those characters into the platform at this time.
- **ACTION**: Be clear in training documentation that this is not possible to include superscripts and subscripts and advise ways to curate information to accommodate those types of characters.
Pilot testers observed that most of the imported publication data needed further curation after import to ensure that the metadata is accurate for such things as whether the publication was peer reviewed, the type of publication, etc. Users were concerned with the time requirement that this would create and would like to see the option to edit the data for many records at once.

- **ACTION:** Discuss with Digital Measures the possibility for an option to edit certain fields for multiple records in one go. Users would check the publications that need to be changed using the checkbox and then edit a set of key fields that are being used to tag publications in reports.

One user stated that they would like to see Activity Insight function like Google Scholar in terms of notifying users of updates to publications that may be theirs. Google Scholar sends weekly/monthly updates informing users that they have new publications and asks if they would like to add them to their profile. The user would like to link multiple citation managers to Activity Insight and have Activity Insight send updates when new publications become available.

- **ACTION:** Recommend to Digital Measures that notification alerts from citation managers be integrated into Digital Measures.

**Creative Screens (Creative Scholarship, Centers for Research and Creative Scholarship, Reviews of Creative Research/Scholarship)**

Overall, creative faculty were very happy to see screens specifically for creative work, and have expressed interest in continuing to work with the FDS team to develop these screens further so that they will be comprehensive for those faculty who will use them. Overall the screens are fairly comprehensive, with the biggest changes needing to be made to the Type of Work (Creative Scholarship screen) and the Media Type (Reviews of... screen) drop-down options. For example: on the Creative Scholarship screen there is not an option for musical performances or recordings. Another issue that applies to both of these screens is that, unlike other screens, 1st Collaborator under the collaborators section does not default to the user.

- **ACTION:** Work with creative faculty to update drop-down options for Type of Work and Media Type.
- **ACTION:** Update Collaborators section so that 1st Collaborator defaults to the user on the Creative Scholarship and the Reviews of Creative Research/Scholarship screens.

**Creative Scholarship**

A faculty member was concerned that there wasn't a way to capture musical performances on this screen; they suggested adding "Sound Performance," which would cover many different types of sound work. One participant mentioned the potential value in adding the ability to indicate whether or not a piece of creative scholarship was peer reviewed. Faculty were concerned that "Organization/Publisher" isn't explanatory enough to imply "Gallery." Additionally, in the note for Collaborators, "firm/organization" isn't inclusive enough to mean other individual artists. It is suggested that this read, "individual/firm/organization." In an
administrator pilot session, it was noted that adding the location of the work with each entry on the summary screen would be helpful. Partway through the series of piloting sessions, it was noted that the "Other" option was not available.

- **ACTION**: Add "Sound Performance" and "Other" to the Type of Work drop-down.
- **ACTION**: Add a "Peer reviewed?" selector to the screen.
- **ACTION**: Update "Organization/Publisher" to "Organization/Publisher/Gallery."
- **ACTION**: Update the "Collaborators" note to read, "individual/firm/organization."
- **ACTION**: Update the summary screen to show location for each record.

**Reviews of Creative Research/Scholarship**

One pilot participant mentioned that they would like to see the option to add page numbers on the screen for Reviews of Creative Research/Scholarship. Another small update for the Reviews of Creative Research/Scholarship screen is that the Summary screen should say "Review of [Work/Performance/Exhibit Reviewed]."

- **ACTION**: Add a field for page numbers.
- **ACTION**: Update the summary screen display so that each record shows, "Review of [Work/Performance/Exhibit Reviewed]."

**Centers for Research and Creative Scholarship**

In a few sessions there was a bit of confusion in regards to what faculty should do if they, for example, founded a center, and then continued on there as the director. The faculty member who brought up this particular example would like to see the option to add more than one role, though this would likely be less functional for reporting purposes.

- **ACTION**: In training, be sure to emphasise the importance of putting in one record per activity, rather than one record that covers multiple activities.

**Sponsored Research**

Pilot test participants were asked to verify the information displayed in the ORA Managed Proposals and ORA Managed Awards screens, which was imported into Activity Insight through an integration with the Kuali Research system. A few participants were unclear on the differences between ORA and Non-ORA activities and required additional information regarding these activities. Some of the participants were not clear if the records displayed were clickable or not and found that some of the data that they expected to see was missing.

- **ACTION**: Add more information regarding the Kuali Research integration in the help text on the ORA screens.
- **RESPONSE**: Midway through the pilot record links were changed throughout the platform from black to blue. This made it easier for users to understand whether summary screen items were clickable to view more information. After the update most
pilot participants did not have an issue and readily clicked on the links to see details about their sponsored research.

**ORA Managed Proposals**

Eight participants were confused by the information presented in the ORA Managed Proposals screen as it related to information they expected to see in the ORA Managed Awards screen. The ORA data was for the 2017 calendar year. However, when these faculty saw the list of proposals, they recognized some that had been funded and didn't understand why they weren't included in the ORA Managed Awards screen.

- **ACTION:** Discuss the faculty experience regarding viewing their grants in relation to the proposal status information with Kuali Research Team and update the help text accordingly to give a clear explanation for the set of proposal data presented for a particular calendar year.

**ORA Managed Awards**

Most participants had multiple entries of the same grant with different Award IDs and were confused as to why there were multiple entries. Participants mentioned that Sponsor Grant Number would be more helpful than Award ID on the summary screen for awards records. Most participants were confused as to why some of their currently active grants and contracts were not included in the ORA Managed Awards listing. Between duplicated listings and missing entries, faculty were concerned that the integration with Kuali Research was not functioning correctly; they questioned the validity of the data presented. In addition, some of the participants were concerned about whether or not it would be a requirement to populate the Anticipated Amount field in the form and how it would be displayed in reports.

- **ACTION:** Add a dashboard view of all currently active contracts and grants at the award-level (as opposed to sub-account) as a reference for faculty; free from duplication and fully listing all of their open contracts and grants.
- **ACTION:** Change the name of Sponsor Number to Sponsor Award Number.
- **ACTION:** Add information to explain the Award ID/sub-account issue in the help text.
- **ACTION:** Add an explanation regarding the use of the Anticipated Amount field.

**Non-ORA Proposals and Awards**

Pilot participants with no ORA sponsored data (primarily those from Arts & Humanities departments) were asked to verify the form available in the Non-ORA sections (Awards & Proposals) on the activities page. A number of participants were unclear as to what "ORA" stood for and required additional information about the Non-ORA sections. In addition, some of the participants were concerned what the investigator meant in the form as most of their grants and awards have no credit division percentage requirement for reporting in Arts and Humanities
departments. Most of the activity types fall under "other sponsored activity" and the participants were displeased with the lack of dropdowns options related to their fields of work.

- **ACTION**: Rename the Non-ORA Awards and Non-ORA Proposals screens to be something that is understandable by all the schools without any prior knowledge of ORA.
- **ACTION**: Add help text for the investigator section of the form and revisit the set of fields included for collaborators.
- **ACTION**: Add more activity types to the drop-down on the Non-ORA form to be more comprehensive for Arts and Humanities fields.

### Generating Reports

Several participants were unable to find the “Report” button and required a prompt to help them. Having a navigation bar under another navigation bar tends to confuse the testers.

A large number of participants found their publications reported in the “Other” section of the UMD Vita they had run from the platform. The categorization of the various books, publications etc needs to be improved. Faculty also requested the ability to download the UMD Vita in .docx file format. Currently only .doc is available.

Users were somewhat taken aback by the fact that all section headers on the UMD Vita populate whether there is data or not. Users also found that their refereed journal articles were not being displayed in the UMD Vita generated by the system, even though the peer-reviewed journal articles were visible on their Publications screen. Some users found that when the report is generated, Invited Talks are being displayed under Teaching Awards. Finally, when faculty ran and then downloaded the report, the default file name was found to be strange. Rather than saving the file with the faculty's name the platform made the default file name the date and the time in Central Standard Time.

- **ACTION**: Create detailed training to help users understand the importance of, and methods for, curating their data before importing it into Activity Insight.
- **ACTION**: Add "publications showing up in the Other section of reports" to an FAQ outlining frequently asked publication import questions.
- **ACTION**: Recommend Digital Measures add a .docx option for report downloads.
- **ACTION**: Be clear in training that the UMD Vita generates faculty achievement information in the recognized UMD Vita template's format. Update the report configuration to skip generation of empty sections.
- **ACTION**: Review the UMD Vita report configuration to ensure peer-reviewed journal articles populate on the report and that tagging of different screens matches with the correct screens on the report.
- **ACTION**: Recommend to Digital Measures to append the faculty name/department name to the default file name for the various reports.
Service and Outreach

Professional and Campus Service and Committees
On this screen the pilot participants were confused by the options for the input of compensation. Compensation has two options: pro bono and compensated. Pilot participants had some confusion as to what “Compensated” meant. As campus service is a requirement of their job, does their salary count as compensated service? Some participants said that if a service was compensated outside of their salary if would count as consulting. A few participants even asked if it was useful to report compensation. Many faculty also found the help text provided on the dates to be confusing. In one case, it made a participant think that the date entries were for single day activities. One participant expressed a desire for a “Director” option for their Role. A few participants also asked for the provision of entering in their work estimate in hours/week.

- ACTION: Review screen configuration and verify need for the pro bono/compensated data field on this screen. If identified as needed, provide radio button options for pro bono and compensated, with pro bono selected as default for the faculty member.
- ACTION: Place the help text below the date entry.
- ACTION: Rephrase the information provided in the help text for dates to make it more understandable. Add default placeholders to indicate year and month entries. Let users know that they can enter the year alone if they are not confident about the exact dates.
- ACTION: Reference the OPA reporting form used campus-wide and adopt the same metric for reporting time as used there. Consistently use this time metric on any screens that request time spent.

Editorships, Editorial Boards, and Reviewing Activities
Users were frustrated by the lack of help text on this screen. Faculty wanted help text on the screen to avoid confusion while entering in editorship-related details. Participants also encountered an overlap with autofill and drop-down options for regional scope. The autofill options get displayed over the field's option set, making options for regional scope difficult to read, and the form field difficult to use. Several participants had some trouble understanding what type of documents would be considered relevant for the “Add Document” button. Several participants had different roles and wanted more information above the drop-down roles in order to select the correct role. Faculty members reported wanting the option to enter their journal URLs, in order to open the journals in another tab. Participants often entered their “Contribution Type” and immediately mentioned their position and how to input that without seeing the “Role” drop-down. Faculty asked if the “Role” drop-down could be moved above “Contribution Type.” Participants were confused about the option for “compensated” and “pro bono” entry. Faculty suggested that more information for this entry is needed in order to make the right choice.

Finally, a few participants stated that they would like to see a way to enter multiple dates for a particular record. For example: if four papers were reviewed for a Journal at different times in the same year, the faculty member would like to add all the dates of the reviewed papers under
the same journal without having to create duplicates activity entries. Another example: two papers from the same journal being reviewed at different times will end up looking like duplicate entries as the only thing that’ll be different is the dates.

- **ACTION**: Replicate the help text from the summary screen on the activity screen.
- **ACTION**: Provide help text for the “Add Document” button to inform faculty of the type of documents they can add to the record.
- **ACTION**: Provide explanatory text for the “Role” drop-down.
- **RESPONSE**: In designing the Creative Scholarship screen—indeed, all of the screens in the platform—our goal has been to balance the achievement data needs of faculty across the institution with data screen usability. In other words, we hope to provide a sufficient range of options without creating drop-down lists that become cumbersome to use. For our initial configuration of the platform, our approach for achieving this balance is to be somewhat constrained in adding options to drop-down menus. As faculty use the platform, we will monitor the use of the Other data field and adjust the configuration based on those usage trends.
- **ACTION**: Provide an optional input box for journal URLs.
- **ACTION**: Move “Role” above “Contribution Type” in the activity screen layout.
- **ACTION**: Provide explanatory help text for the “compensated” or “pro bono” choice.
- **ACTION**: Ensure training materials direct faculty to curate entries for each set of dates and each role so that their activities will be counted on more of a 1:1 basis, rather than being lumped together.

**Consulting**

Similar to the issues faced in the “Editorships, Editorial Boards, and Reviewing Activities” screen, participants encountered an overlap with autofill and drop-down options for regional scope. The autofill options get displayed over the screen’s given options, making options for regional scope difficult to read. Users wanted to get a little more information about what defines consulting activities, and what its boundaries are. Several participants were unsure of what Consulting Type meant and whether this was referring to the faculty or the organization. Since faculty consulting type would by default be academic, the screen is essentially asking for the consulting type of the organization. Participants were also confused by the input format provided for collaborators because 1st Collaborator (usually them) is written in the leftmost field of the row and in the same row the option to enter another collaborator is provided. This was not very intuitive for them. Similar to the problem faced by participants in the “Professional and Campus Service and Committees,” faculty were confused about the option for “compensated” and “pro bono” entry. Faculty suggested more information for this entry in order to make the right choice.

- **ACTION**: Rephrase “Consulting Type” to remove the ambiguity associated with it.
- **ACTION**: Move the “Organization” input above “Consulting Type.”
- **ACTION**: Provide help text to explain the “compensated” or “pro bono” choices.
External, Community, and Other Service

The term “External” confused several pilot participants. A few extension faculty members mentioned the importance of volunteer work, explaining that volunteer work holds monetary value; they consider time spent volunteering in activities as money provided by the faculty to the institution. They would also like an option that would support their activities in capacity building, e.g. helping or advising on grant proposals. They stated that providing a way for them to input aggregated volunteer hours will help with their dossier preparation for APT. On this activity screen, the optional country input box is already populated as “United States,” which threw off faculty; it wasn’t what they were expecting regarding required and optional data fields on the screens. Under the Collaborators section, there is help text that tells the faculty to select their collaborators using the drop-down list, but the screen does not have a drop-down list.

- **ACTION:** Consult with Advisory Group to identify an appropriate screen name.
- **ACTION:** Unpopulate the optional input boxes in the screen.
- **ACTION:** Consult with Extension leadership to ensure that the configuration accommodates their needs, including incorporation of their voluntary work. Provide explanatory materials to help Extension faculty.
- **ACTION:** Alter the help text provided under the Collaborator section.

Chair and Administrator Pilot Experience

Apart from pilot testing faculty members, a separate pilot task list was used with chairs and administrators. These tasks focused on testing the intuitiveness of the Activity Insight platform for administrative activities.

Administrative participants were asked to login to the platform and complete a list of tasks (see Appendix A) with no advance training so that the team could observe the ways the participants would intuitively attempt to complete the tasks, which allowed the team to gain insights into which aspects of the platform are intuitive and where changes may need to be made to make the platform easier to use.

Manage Data

Many administrative user pilots were confused by the Continue button on the Manage Data screen, as it was not apparent that they needed to click it to view the activities of a specific faculty member. Users often needed prompting from the facilitators to move past this step. Also, the "Show" label for the Account Type was unclear in its meaning to users and many required assistance with this option. The navigation option “Manage Activities” is for users to check their own information. However, most administrative pilot participants used the "Manage Data" screen to select themselves. For the “User” label, the input box has placeholder text that reads,
“Select or type a name.” When users try to type in a name, it is often the case that the name they enter gets appended to the first user on the dropdown list. On selection of a faculty member the dropdown icon changes into a cross icon that suggests cancel action, but this icon tended to confuse users into thinking that there was no longer a dropdown available. A few administrative participants reported that the set of faculty members they could see in Activity Insight did not match with the faculty they have in their department.

- **ACTION:** Recommend to Digital Measures that the text of the "Continue" button change to "Show Activities." This would help the user move on to the next step.
- **ACTION:** Develop clear training materials for administrative users guiding them on their use of the Manage Data interface.
- **ACTION:** Recommend to Digital Measures that the "Show" label change to "Account Type" to clarify the content of the associated drop-down.
- **ACTION:** Consult with vendor to identify more appropriate navigation names for “Manage Data” and "Manage Activities."
- **ACTION:** Recommend to Digital Measures that the cross icon at the right edge of input drop-down fields be replaced with an arrow icon similar to the one in with the pop-up for rapid reports.
- **ACTION:** Recommend to Digital Measures that the User dropdown be modified to allow searching of a faculty member without causing the input to be appended onto the first user's name in the user list.
- **ACTION:** Work with administrators in the Dean's office in each school to configure access in Activity Insight for chairs, directors and other administrative users to ensure that the correct PHR departments are selected for these users.

**Report and Rapid Report**

Participants were slightly confused as to what “Enabled Only” meant. Also, the “Change Selection” label was not indicative of being a clickable feature. Some of the participants also wanted to change the “User selected by” input to a single user i.e. mainly the user they were currently managing. With prompts from facilitators they went to “Change Selection” and individually unchecked the checkboxes. The default naming convention of the reports downloaded was not very well understood by a few participants, especially when they were generating reports for individual faculty members.

- **ACTION:** Recommend to Digital Measures that help text be added to explain the meaning of “Enabled Only.”
- **ACTION:** Provide training on the use of rapid reports, clarifying how to run reports for the faculty member(s) they are currently managing.
- **ACTION:** Recommend to Digital Measures that the “Change Selection” text be changed to underlined blue text to indicate it is a hyperlink that can be selected.
- **ACTION:** Develop training materials to guide administrative users in report generation.
- **ACTION:** Recommend to Digital Measures that the name of the faculty member be appended to the generated report file name.

## Appendices

### Appendix A. Methodology

Participants completed a task sheet that was developed by the Faculty Data Systems (FDS) Team. The purpose of the task sheet was to allow participants (in a specified order) to explore the data system and complete certain functions, such as verifying pre-entered/integrated data; inputting new data; and importing publications. The FDS Team provided overall orientation and guidance to participants but allowed participants to complete the task sheet on their own. While the participant completed each task, the FDS team members took notes on the participant's questions, comments, concerns, and suggestions for improvement. The notes from each participant were compiled and analyzed to elucidate themes and findings—many of which are contained in this report. Below is the task sheet completed by each pilot participant.

### Activity Insight Pilot Testing Task Lists

**Faculty**

- **Check appointments data**
  - Log into Activity Insight at: [https://faculty.umd.edu/data/index-v.html](https://faculty.umd.edu/data/index-v.html)
  - Under General Information, go to the *Tenure and Rank Data* and the *Appointments at UMD* screens to validate that the correct set of appointments appears for you for the past eight years (i.e. since 2010)

- **Add Advising Data**
  - Add some/all of your 2018 activity data for advising
    - List number of students you have advised so far in 2018
    - Provide information about the thesis/dissertation committees you’ve served on
    - Provide information about any additional mentoring activities you did (i.e. with junior faculty members, etc.)

- **Enter Service/Outreach Data**
  - Add some/all of your 2018 activity data for service/outreach including:
    - Editorships, Editorial Boards, and Reviewing Activities
    - Community Service
    - Committee Service

- **Import Scholarly Work**
Attempt to import your publications and then validate what has been imported. Try using the following integrations with Activity Insight:

- Google Scholar
- Web of Science (if applicable)
- Crossref (if applicable)
- PubMed (if applicable)

**Review Lyterati Data**

- Review and correct the Lyterati data that has been imported for you. Our Graduate Assistants have gathered, cleaned, and imported data originally input into Lyterati. Please check the data imported, see if it’s correct, and update as needed. You will likely find this data under the following screens:
  - Other Employment (i.e. Work Experience)
  - Educational Background
  - Awards and Honors
  - Continuing Education
  - Post-Graduate Training
  - Inventions and Patents
  - Mentorship
  - Other Teaching
  - Teaching Innovation
  - Publications of type monograph, invited review and perspectives, opinions and letters

**Review ORA data for 2017**

- View sponsored research proposals and awards data for 2017 that is related to ORA. This information has been imported automatically.

**Review Scheduled Teaching data for 2018**

- View Spring/Summer 2018 course data on the Scheduled Teaching screen and check for accuracy. This information has been imported automatically.

**View Teaching Evaluation data**

- View your teaching evaluation data for the 2016-2018 period and check for accuracy. This information has been imported automatically.

**Run a Report**

- Create a UMD Vita from the data you’ve entered

**For Faculty with Creative Scholarship**

- Under Research, Scholarly, Creative and/or Professional Activities, go to Creative Scholarship
- Click Add New Item
- Enter a recent item of creative scholarship that you have created, letting us know if there is anything missing on this screen that would allow you to more effectively enter your creative scholarship
Administrators

- **Check Faculty Appointments**
  - Log into Activity Insight at: [https://faculty.umd.edu/data/index-v.html](https://faculty.umd.edu/data/index-v.html)
  - Choose a faculty member from your department (under Activities (top left) choose Manage Data, then choose a faculty member)
  - Under General Information, go to the *Tenure and Rank Data* and the *Appointments at UMD* screens to validate that the correct set of appointments appears for the past eight years (i.e. since 2010) for the chosen faculty member

- **View Activity Data**
  - Select a faculty member in your department to view their activities (try to choose a faculty member who you know should have a lot of data. I.e. one who has been at Maryland for a number of years)
  - Check any of the following screens for historical activities: Educational Background, Post-Graduate Training, Other Employment, Professional Certifications and Licenses, Professional Memberships, Mentorship, Other Teaching, Teaching Innovation, Inventions and Patents, Publications of (type monograph, invited review and perspectives, opinions and letters.)
  - Check to see that data make sense for the screen they are posted on
  - Keep in mind that this information will be from 2015 and earlier because it was loaded from the available Lyterati data
  - Repeat this process for multiple faculty members in your department

- **Run a Report**
  - Create a report from the data available. You can choose from the following: Faculty/Staff Directory, Academic Degrees Earned, Faculty Annual Activity Report, UMD Vita

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**Appendix B. Usability Issues and Possible Solutions**

**Background**

The issues identified below were identified in usability test sessions at University of Maryland with faculty and administrative users in more than fifty test sessions. Trends were observed across the sessions, which resulted in the list of issues outlined below. Each issue is presented through a description of the challenge users experienced and is accompanied by a recommendation for improving the usability of the platform.

It should be noted that these test sessions did not involve any training on use of the platform. For the most part, users were successful in navigating use of the system—a credit to the usability of the interface. Attention to the issues below will enhance that experience and increase the intuitiveness of the platform.
1. Recognizing Linked Text

Users cannot figure out if the text available on the activity screen is clickable or not. A half a dozen participants during pilot testing had to be prompted to click on the black text as the participants could not figure out if the text was clickable or not. The linked text on the Activities screen was not immediately recognizable as clickable text.

Recommendation: Use blue to tap into the recognizability of hyperlinked text.

![ALL CLICKABLE LINKS](image)

2. Hints for Date Fields

Users found it difficult to figure out what the drop-down and fields for dates require and needed prompts from the pilot facilitator. Adding placeholder text would help users identify the input type required. Often, pilot faculty did not understand that the date fields were month, day, year or month, year. They were lost as to what to enter.

Recommendation: Provide hints within the input fields on the type of data expected.

![DATE SELECTOR](image)
3. Cancel Clear Icon

Several users had problems with the cross button at the right edge of input fields. The cross buttons do not provide any indication of the field being a drop-down for users in our piloting experience. They should be used for clearing the input filled in the input text field but users had difficulty getting them to function in this way.

Recommendation: Replace the icon at the right edge of these input drop-down fields with an icon similar to the one used in the pop-up for rapid reports.

4. Visibility of Active Button

Many of the participants experienced difficulty figuring out where to find the Add New Item button on the Activity Summary screen, or the Save button on the activity screens.

In the user flow with an Activity Summary screen, faculty would review informational text on the screen, look over any summary records, and then scan the screen to find the way for them to
add an activity. They had difficulty noticing the Add New Item button; it did not stand out as an active button for them.

As faculty managed data on an activity screen, they reviewed and curated data about their activity on the screen. As with the summary screen, when faculty were done with their work with data on the screen, they had difficulty noticing the Save button at the top of the screen; it didn’t stand out as an active button to them.

**Recommendation:** Add color to the primary button. This would grab the user’s attention to click the button to perform the primary function of that specific page. Additionally, adding hover help text to the buttons would help the user identify the function performed by the button.

**5. Record Selection on Summary Screens**

While duplicating or deleting specific publications or educational background records, users were unable to locate the checkbox available for each record at the right hand side of the summary screen.

**Recommendation:** Add a different, darker color (other than light gray) to help improve the findability of the checkbox.
6. Help Text and Navigation

Very few participants read the help text to help them understand what each screen required.

Navigating between screens was difficult for many pilot participants. Many used the browser back button, or had to be advised by the facilitator how to go back to the previous screen. Sometimes using the browser back button was not helpful and users would be trapped and could not navigate to the Activities or Reports screen.

Recommendations:

- Use a bold font style and/or a different color to help direct user attention towards the help text on each page.
- Add a breadcrumb to help users track their progress from the home screen and to help them navigate back by using the page links on the breadcrumb.
7. Publication Import: Many Skips

With Publication Import, faculty members had to individually skip all the duplicated entries for publications. Most of them had over 15 duplicates, and would like an option to “Skip all.”

Recommendation: Add Skip All button/function to apply the Skip action to all duplicates identified with the import.
8. Save Button Not Visible When Done Entering Data

Faculty members entered data on screens with many fields that required them to scroll down to complete their curation and review. The majority of the screens have, as a last optional set of fields, the ability to upload supporting documentation. This is a DSA to support the upload of one or more files. As a result, when participants were done with the record, and were looking for a way to finish/save their work, their eyes continued moving downward on the screen and they expected the Save button to be at the bottom. They confused the “+Add” button (intended for adding documentation) with the “Save” function. This happened most often with screens such as Publications where there are many form fields. As faculty scrolled down to fill in all of the data, they didn’t look to the Save button at the top of the page. They would see the +Add button and think it was there to Add the data as a new activity entry (in reality, it is to add another DSA for uploading a file).

Recommendation: Include an additional Save button at the bottom of each screen.
9. Date Identification for Reports

Provision of the Start date for “Run Report” caused faculty to run reports without changing the start date. The faculty assumed that the UMD Vita would contain all of their information (all dates) by default rather than it being based on a specific date range.

Recommendation: Remove defaults for the start date on reports. Include hints on the type of data expected in each field to help prompt users on how to fill in the start date.
10. Publication Import: Skip/Import Options

During publication import when duplicates are found, faculty have the choice between “Skip” and “Import”. “Import” allows for the import of the compared publication. However, both the copies of the publication are kept. Faculty expected their older version to be replaced when selecting the “Import” option.

Recommendation: To better match the faculty’s expectations in handling duplicate publication records, the “Import” button should be renamed “Replace” and the backend functionality should be modified to replace the older version.
11. Radio Buttons and Checkboxes for data entry

For data fields with just a few options, faculty were not aware of the options while scanning the screen—they needed to click on the associated drop-down to reveal the set of possible values. This slowed their progress in curating activity data and resulted in more clicks per data field.

Recommendation: Use radio buttons instead of drop-down lists for data fields with only two or three options.

12. Manage Data: "Continue" once user is identified

Many administrative users did not realize they should click the Continue button on the Manage Data screen to view the activities of a specific faculty member, and needed prompting from the pilot session facilitator.

Also, the "Show" label for Account Type is unclear; many users required explanation.

Recommendation:
- Change the text of the "Continue" button to "Show Activities." This would help users make the connection with the next step.
- Change the "Show" label to "Account Type" to clarify the content of the associated drop-down.
SELECTING FACULTY MEMBER

Manage Data

Manage Data enables you to manage data for other users or entities within your system. If you are entering a lot of data, it may be faster to load this from CSV files rather than by using this utility. All changes made using this utility are audited. Manage Data sessions open in a new tab.

Manage Data for Users

User: Adler, Eric
dale
Show: Enabled Accounts only

Manage Administrative Data for Users

↓

Manage Data

Manage Data enables you to manage data for other users or entities within your system. If you are entering a lot of data, it may be faster to load this from CSV files rather than by using this utility. All changes made using this utility are audited. Manage Data sessions open in a new tab.

Manage Data for Users

User: Adler, Eric
dale
Account Type: Enabled Accounts only

Manage Administrative Data for Users