University librarians need only to utilize a subset of the screens available in Activity Insight to complete their annual review. This document provides a visual of those screens (see below) as well as a table that maps sections from the DLS Annual Review Template to Activity Insight.

The following screens pull directly to the Annual Review:

- Administrative Assignments
- Awards and Honors
- Consulting and Outside Practice
- Academic Certificates
- Non-Degree Coursework
- Faculty Development Activities
- Media Appearances and Interviews
- Professional Licensure and Certification
- Professional Memberships
- Academic Advising
- Non-Credit Instruction Taught
- Scheduled Teaching
- Contracts, Grants and Fellowships
- Presentations
- Publications
- University Service
- Professional Service
- Public Service
- Library Instruction and Orientation
- Research Consultations
- Other Librarianship Activities

Activity Insight can also be used to produce a CV, but you will need to enter records are other screens for this purpose.
## Mapping Guide

The table below maps sections from your old annual review template to screens within Activity Insight. The Faculty Instructions column highlights the fields that must be completed within Activity Insight. There are additional fields on all of these screens that you are encouraged to complete as a part of your record keeping, but they will not pull directly into your annual review.

<table>
<thead>
<tr>
<th>DLS - Annual Review Template</th>
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</tr>
</thead>
<tbody>
<tr>
<td>A. Librarianship</td>
<td></td>
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</tr>
</tbody>
</table>
| 1. Archives projects         | Other Librarianship Activities             | Select Archives and Digital Initiatives as Activity Type Complete the following fields:  
|                              |                                            | • Describe the project or work  
|                              |                                            | • Purpose/Value  
|                              |                                            | • Target Audience  
|                              |                                            | • URL, if applicable  
|                              |                                            | • Collaborators  
|                              |                                            | • Dates  |
| 2. Assessment projects       | Other Librarianship Activities             | Select Assessment as Activity Type Complete the following fields:  
|                              |                                            | • Describe the project or work  
|                              |                                            | • Purpose/Value  
|                              |                                            | • Target Audience  
|                              |                                            | • URL, if applicable  
|                              |                                            | • Collaborators  
|                              |                                            | • Dates  |
| 3. Collection development projects, e.g., accreditation reports, library impact statements, major weeding projects, etc. | Other Librarianship Activities | Select Collection Services as Activity Type Complete the following fields:  
|                              |                                            | • Describe the project or work  
|                              |                                            | • Purpose/Value  
|                              |                                            | • Target Audience  
|                              |                                            | • URL, if applicable  
|                              |                                            | • Collaborators  
<p>|                              |                                            | • Dates  |</p>
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| 4. Conferences/workshops attended (include Sierra training and similar courses) | Faculty Development Activities | Complete the following fields:  
- Activity Type  
- Title  
- Sponsoring Organization  
- Location  
- Dates |
| 5. For-credit courses taught or co-taught (if applicable) | Scheduled Teaching | These data are preloaded. If you have scheduled teaching records, they will automatically pull into your annual review. It's important to open each teaching record in Activity Insight and review for accuracy and answer all Service Learning questions. |
| 6. Library instruction sessions taught or co-taught | Library Instruction and Orientation | Select any of the Activity Types and complete the following fields:  
- Course prefix (if applicable)  
- Course Number (if applicable)  
- Event or Course Name  
- Instructor (if applicable)  
- Topic  
- Number of Students/Participants  
- Dates |
| 7. Library interns or volunteers supervised | Administrative Assignments | Supervision of all subordinates (faculty, staff, students, volunteers, and interns) should be recorded under Administrative Assignments. Select your position/role (if one doesn't exist, choose other and provide an explanation) and complete the following fields:  
- Responsibilities/Brief Description  
- Dates |
| 8. Number of research consultations | Research Consultations | Reporting research consultations has expanded beyond number of events. They are now reported by Client Type. Complete the following fields:  
- Client Type  
- Client Name  
- Research Topic  
- Campus  
- Date |
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<tr>
<td>9. Special recognition inside or outside the university for excellence in librarianship</td>
<td>Awards and Honors</td>
<td>In order for the award to appear under librarianship, the award type must be &quot;Professional Performance&quot;, &quot;Leadership&quot;, or &quot;Other.&quot; Complete these additional fields:  [ newline ]  • Nominated or Received  [ newline ]  • Award or Honor Name  [ newline ]  • Organization/Sponsor  [ newline ]  • Brief Description/Explanation  [ newline ]  • Dates  [ newline ]  <em>Awards in Scholarship and Teaching are also captured on this screen but are reported in different sections on the annual review. All of the same fields must be completed.</em>  [ newline ]</td>
</tr>
<tr>
<td>10. Subject guides, instructional materials, teaching manuals, or operational guides created</td>
<td>Other Librarianship Activities</td>
<td>Select Research Services as Activity Type. Complete the following fields:  [ newline ]  • Describe the project or work  [ newline ]  • Purpose/Value  [ newline ]  • Target Audience  [ newline ]  • URL, if applicable  [ newline ]  • Collaborators  [ newline ]  • Dates  [ newline ]</td>
</tr>
<tr>
<td>11. Technical Services &amp; Systems, e.g., cataloging projects, creating software, etc.</td>
<td>Other Librarianship Activities</td>
<td>Select Technical Services and Systems as Activity Type. Complete the following fields:  [ newline ]  • Describe the project or work  [ newline ]  • Purpose/Value  [ newline ]  • Target Audience  [ newline ]  • URL, if applicable  [ newline ]  • Collaborators  [ newline ]  • Dates  [ newline ]</td>
</tr>
<tr>
<td>12. Other examples</td>
<td>Other Librarianship Activities</td>
<td>Select Other as Activity Type and add an explanation. Complete the following fields:  [ newline ]  • Describe the project or work  [ newline ]  • Purpose/Value  [ newline ]  • Target Audience  [ newline ]  • URL, if applicable  [ newline ]  • Collaborators  [ newline ]  • Dates  [ newline ]</td>
</tr>
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<td>B. Scholarship</td>
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<tr>
<td>1. Books authored</td>
<td>Publications</td>
<td>You don’t need to manually enter publication data. You can import your publications with BibTeX or PubMed. Click the “Import Items” button and follow the directions on the screen.</td>
</tr>
<tr>
<td>2. Articles</td>
<td>Publications</td>
<td>Once you have loaded your publications, check them for accuracy and complete the following fields:</td>
</tr>
<tr>
<td>3. Book chapters</td>
<td>Publications</td>
<td>• Current Status – note that current status must be accepted, in press or published to appear in your annual review</td>
</tr>
<tr>
<td>4. Book reviews published</td>
<td>Publications</td>
<td>• Was this peer-reviewed/refereed?</td>
</tr>
<tr>
<td>5. Proceedings published</td>
<td>Publications</td>
<td>• Author Information (name, institution, role, and if student)</td>
</tr>
<tr>
<td>6. Books edited</td>
<td>Publications</td>
<td>• Web address</td>
</tr>
<tr>
<td>7. Reference entries (encyclopedia, dictionary, etc.) published</td>
<td>Publications</td>
<td>You will need to enter your reference entries manually. Select Reference Entry as your Contribution Type and complete the following fields:</td>
</tr>
<tr>
<td></td>
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<td>• Title of Contribution</td>
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<td>• Title of Larger Work</td>
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<td>• Publisher</td>
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<td>• Page Numbers</td>
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<td></td>
<td>• Was this peer-reviewed/refereed?</td>
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<td></td>
<td></td>
<td>• QEP question</td>
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<td></td>
<td></td>
<td>• Author Information (name, institution, role, and if student)</td>
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<tr>
<td></td>
<td></td>
<td>• Web address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Dates – note that if the date accepted or published doesn’t fall in the record year, it will not appear in your annual review</td>
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</tbody>
</table>
| 8. Papers, presentations, or poster sessions presented | Presentations | All activities that relate to presentations are reported together in the annual review by the Presentation Type. Complete the following fields:  
- Presentation Type  
- Conference/Meeting Name  
- Presentation Title  
- Sponsoring Organization  
- Location  
- Presenters/Authors (including role)  
- Dates |
| 10. Presentations made to groups outside the university | | |
| 11. Physical or virtual exhibits prepared. | Other Librarianship Activities | Select the Activity Type that applies to the exhibit and complete the following fields:  
- Describe the project or work  
- Purpose/Value  
- Target Audience  
- URL, if applicable  
- Collaborators  
- Dates |
| 12. Web pages that do not fit in categories above | Publications | Select Webpage as your Contribution Type and complete the following fields:  
- Current Status – note that current status must be accepted, in press or published to appear in your annual review  
- Title of Contribution  
- Was this peer-reviewed/refereed?  
- QEP question  
- Author Information (name, institution, role, and if student)  
- Web address  
- Dates – note that if the date accepted or published doesn’t fall in the record year, it will not appear in your annual review |
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</table>
| 13. Additional advanced degree/certification or academic coursework | Academic Certificates; Professional Licensure and Certifications; Non-Degree Coursework | For Academic Certificates complete the following fields:  
• Title  
• Institution  
• Dates  
For Professional Licenses/Certifications complete the following fields:  
• Title of Licensure/Certification  
• Sponsoring Organization  
• Description  
• Dates  
For Non-Degree Coursework complete the following fields:  
• Term  
• Year  
• Institution  
• Course Prefix  
• Course Number  
• Course Title |
| 14. Grant proposals submitted and/or received *(indicate if principal investigator and whether funded or not)* | Contracts, Grants, Fellowships | Select the appropriate Type and complete the following fields:  
• Focus  
• Sponsoring Organization  
• Awarding Organization Is  
• Current Status  
• Total Amount  
• Investigator Information  
• Dates |
<p>| 15. Other examples | Publications; Presentations | Any record that you include in presentations or publications will pull to the annual review provided it falls in the reporting year. |</p>
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| NEW Scholarship Area         | Media Appearances and Interviews          | The old annual review did not include an explicit category to capture media appearances and interviews. If you had activities in this area, complete the following fields:  
  - Article/Segment Title  
  - Program/Media Outlet Name  
  - Description  
  - Publication/Air Date |

C. Service

1. Current membership/leadership in professional associations *(indicate your role and name of group)*

   a. Local  
   b. State  
   c. Regional  
   d. National  
   e. International  

   - Professional membership  
   - Your leadership in a professional organization is captured on Professional Service screen.  
   - Capture your membership by completing the following fields:  
     - Name of Organization  
     - Description of the Organization  
     - Dates

2. Memberships on advisory boards or committees *(indicate your role and name of group)*

   a. University Libraries or other academic unit  
      - University Service  
      - Select College/School as Scope and complete the following fields:  
        - Position/Role  
        - Organization/Committee  
        - Responsibilities/Brief Description  
        - Dates

   b. University  
      - University Service  
      - Select University as Scope and complete the following fields:  
        - Position/Role  
        - Organization/Committee  
        - Responsibilities/Brief Description  
        - Dates
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<td>c. Local</td>
<td>Professional service and Public Service</td>
<td>This kind of service can be recorded on either the Professional or Public Service screens. If the service is professional, complete the following fields: • Position/Role • Is this a leadership role? • Organization/Committee/Journal • Location • Responsibilities/Brief Description • Audience • Dates If the service is public in nature, complete the following fields: • Position/Role • Organization/Committee • Organization Type • Responsibilities/Brief Description • Audience • Dates</td>
</tr>
<tr>
<td>d. State</td>
<td>Professional service and Public Service</td>
<td></td>
</tr>
<tr>
<td>e. Regional</td>
<td>Professional service and Public Service</td>
<td></td>
</tr>
<tr>
<td>f. National</td>
<td>Professional service and Public Service</td>
<td></td>
</tr>
<tr>
<td>g. International</td>
<td>Professional service and Public Service</td>
<td></td>
</tr>
<tr>
<td>3. University advising activities</td>
<td>Academic Advising</td>
<td>These data are preloaded. If you have academic advising records, they will automatically pull into your annual review. It's important to open each teaching record in Activity Insight and review for accuracy and provide a &quot;Brief Description of Advising Activities.&quot;</td>
</tr>
<tr>
<td>4. For-credit courses taught or co-taught (if applicable)</td>
<td>Scheduled Teaching</td>
<td>This teaching has already been reported in the Librarianship section above.</td>
</tr>
<tr>
<td><strong>NEW</strong> Service Area</td>
<td>Non-Credit Instruction</td>
<td>The old annual review did not include an explicit category to capture non-credit instruction. If you provide non-credit instruction, complete the following fields: • Instruction Type • Sponsoring Organization • Number of Participants • Description • Dates</td>
</tr>
<tr>
<td>5. Consulting work</td>
<td></td>
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<tr>
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</tbody>
</table>
| a. University               | University Service                      | Select University as Scope and complete the following fields:  
|                             |                                        | •  Position/Role     
|                             |                                        | •  Organization/Committee  
|                             |                                        | •  Responsibilities/Brief Description  
|                             |                                        | •  Dates               |
| b. Outside bodies           | Consulting and Outside Practice         | Only Pro Bono Consulting is reported in the Annual Review. Complete the following fields:  
|                             |                                        | •  Client/Organization/Employer Name  
|                             |                                        | •  Client/Organization Employer Type  
|                             |                                        | •  Location             
|                             |                                        | •  Brief Description      
|                             |                                        | •  Dates               |
| 6. Contributions to cooperative programs or interdisciplinary activities | a. University Other Librarianship Activities | Select the appropriate Activity Type and complete the following fields:  
|                             |                                        | •  Describe the project or work  
|                             |                                        | •  Purpose/Value          
|                             |                                        | •  Target Audience        
|                             |                                        | •  URL, if applicable      
|                             |                                        | •  Collaborators          
|                             |                                        | •  Dates               |
|                             | b. Outside bodies Other Librarianship Activities | Select the appropriate Activity Type and complete the following fields:  
|                             |                                        | •  Describe the project or work  
|                             |                                        | •  Purpose/Value          
|                             |                                        | •  Target Audience        
|                             |                                        | •  URL, if applicable      
|                             |                                        | •  Collaborators          
<p>|                             |                                        | •  Dates               |</p>
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| 7. Planning professional meetings/seminars/institutes/workshops | Professional Service | This is best captured under Professional Service. Complete the following fields:  
- Position/Role (likely Program or Workshop Organizer)  
- Organization/Committee/Journal  
- Location  
- Responsibilities/Brief Description  
- Audience  
- Dates |
| 8. Professional mentoring | University Service | In order to identify your role as a mentor, you must select Junior Faculty/New Faculty Mentor or Peer Reviewer as your Position/Role and complete the following fields:  
- Scope  
- Organization/Committee  
- Responsibilities/Brief Description  
- Dates |
| 9. Community service organizations or projects | Public Service | Complete the following fields:  
- Position/Role  
- Organization/Committee  
- Organization Type  
- Responsibilities/Brief Description  
- Audience  
- Dates |
| 10. Service to religious bodies | Public Service | This will be reported in your annual review as long as you identify the Organization Type on the Public Service screen. Complete the following fields:  
- Position/Role  
- Organization/Committee  
- Organization Type  
- Responsibilities/Brief Description  
- Audience  
- Dates |
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| 11. Military service         | Public Service                            | This will be reported in your annual review as long as you identify the Organization Type on the Public Service screen. Complete the following fields:  
• Position/Role  
• Organization/Committee  
• Organization Type  
• Responsibilities/Brief Description  
• Audience  
• Dates |
| 12. Service as an editor/reviewer for professional journals/publishers | Professional Service                      | This will be reported in your annual review as long as you identify the Role as Editor or Editorial Review Board Member on the Professional Service screen. Complete the following fields:  
• Position/Role  
• Organization/Committee/Journal  
• Location  
• Responsibilities/Brief Description  
• Audience  
• Dates |
| 13. Service as a grant reviewer | Professional Service                      | This will be reported in your annual review as long as you identify the Role as Grant Reviewer on the Professional Service screen. Complete the following fields:  
• Position/Role  
• Organization/Committee/Journal  
• Location  
• Responsibilities/Brief Description  
• Audience  
• Dates |
| 14. Scholarly artistic performances or creative works | Other Librarianship Activities            | Select Other as Activity Type and add an explanation. Complete the following fields:  
• Describe the project or work  
• Purpose/Value  
• Target Audience  
• URL, if applicable  
• Collaborators |
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</tr>
<tr>
<td>15. Other examples</td>
<td></td>
<td>Other examples will have been captured by records entered on the screens highlighted in this document.</td>
</tr>
</tbody>
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