UNIVERSITY OF MARYLAND

THE OFFICE OF FACULTY AFFAIRS

Faculty Success:

Faculty Guide

Welcome to Faculty Success!

Faculty Success is our implementation of Watermark's Faculty Success (formerly called Digital Measures), a fully customizable online information management system designed to organize and report on your research/creative activities, teaching, and service accomplishments. It provides the most reliable, versatile, and secure solution for generating custom reports easily and in real time.

Benefits to Users

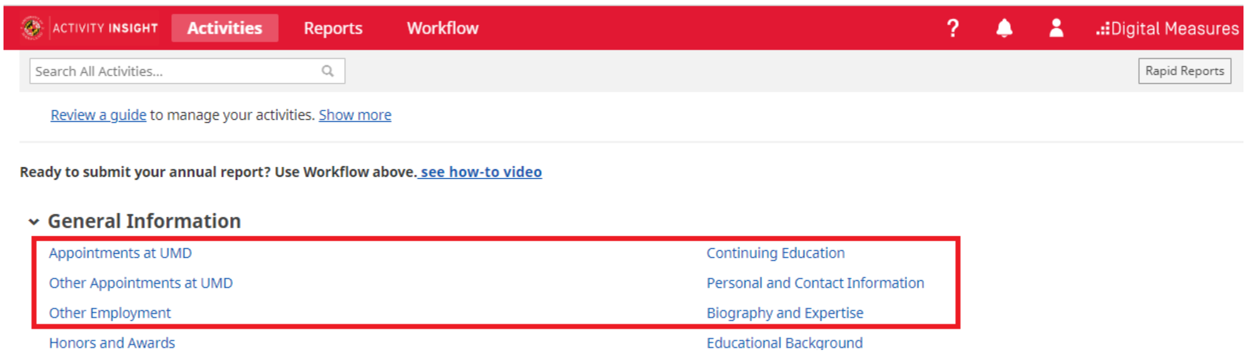
Faculty Success eliminates periodic, recurring requests for information on your activities and accomplishments. Faculty can also generate up-to-date CVs as well as annual reports. The web-based interface is easy to use and intuitive.

Logging In to Faculty Success

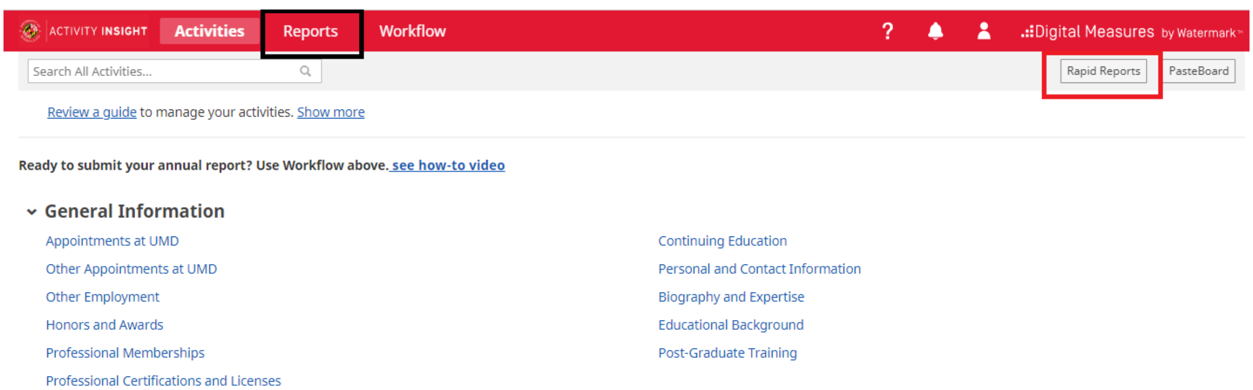
To log in to Faculty Success, navigate to the [Faculty Success portal]() and use the Login to Faculty Success tab. You'll use CAS to authenticate.

Faculty Success Overview

The Activities screen will be your home screen. From this screen you can choose any of the blue links to enter or edit activities.



Reports can also be generated through the Reports button in the top navigation bar, or from the Rapid Reports button available on every screen.



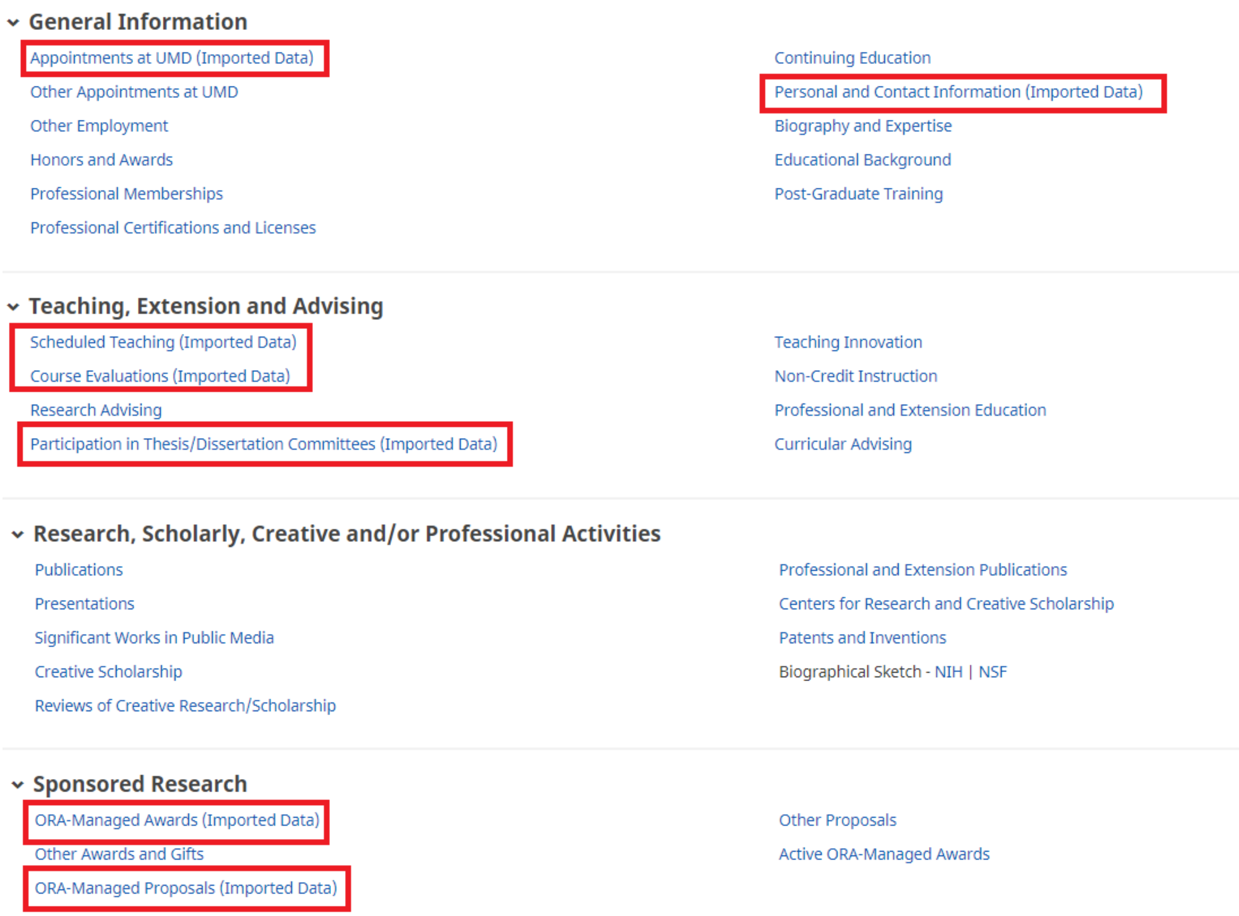
The **?** icon in the top navigation bar opens a popup that sends email directly to the Faculty Success team at UMD.

The *Search All Activities…* input area is a quick way to locate activities on any screen based on free-text search terms.

The guide available for review on the Activities screen is provided by Faculty Success. Use the *Show more* link to access this UMD Faculty User Guide.

Data Brought In From Other Sources

Faculty Success automatically brings in activity data from other sources, in particular other campus data management systems. The below highlighted sections bring in such data so it does not have to be manually entered. These can be easily identified with the 'Imported Data' keyword:



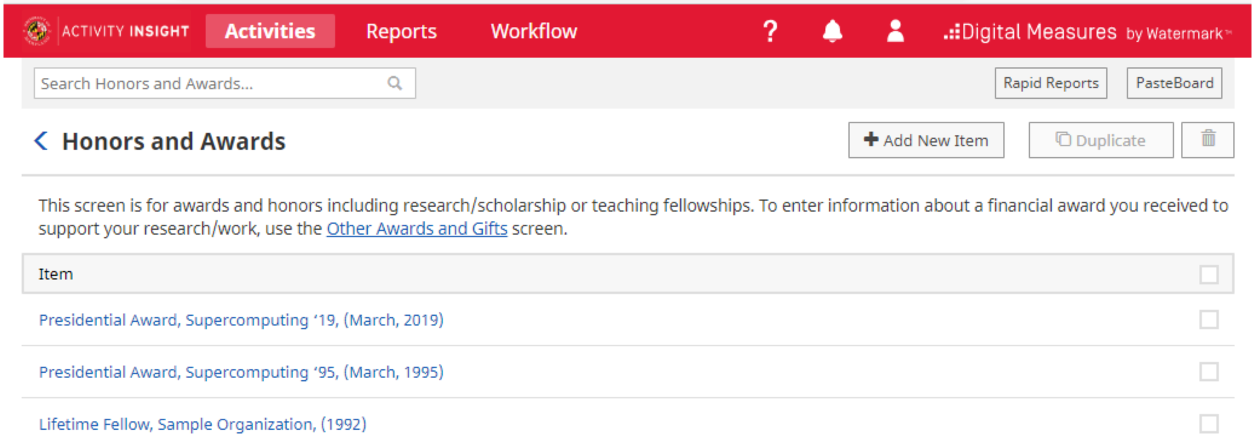
Note that data populated from a number of campus integrations cannot be edited on the data screen. Check below to see where the data is drawn from, how often the update occurs, how far back the data goes, and how to get changes made, if needed.

Activity Screen Name	Campus System	Data Update Schedule	Data Coverage	Contact Information for Updates/Changes
Personal and Contact Information	PHR	Bi-weekly on Mondays	2010-present	PHR Data Verification
Tenure and Rank Appointments at UMD	PHR	Bi-weekly on Mondays	2010-present	If changes are needed contact your unit's PHR coordinator.
Scheduled Teaching	SIS	Five weeks after the term ends	2010 academic year - present	If you want to have a change made in the scheduling system, please contact your scheduling officer.
Course Evaluations	Course EvalUM	Five weeks after the term ends	2014 academic year - present	If you have questions about the data on this screen, contact the CourseEvalUM Help Center.
ORA Managed Awards ORA Managed Proposals	Kuali Research	Late January each year, with the previous calendar year's data	2010-present	Requests for corrections to Kuali Research for any active projects can be made through your department's business administrator.
Participation in Thesis/Dissertation Committees	Graduate School Student Advising	Five weeks after the term ends	2012-2019 academic year	Faculty Success Team (dm-help@umd.edu)

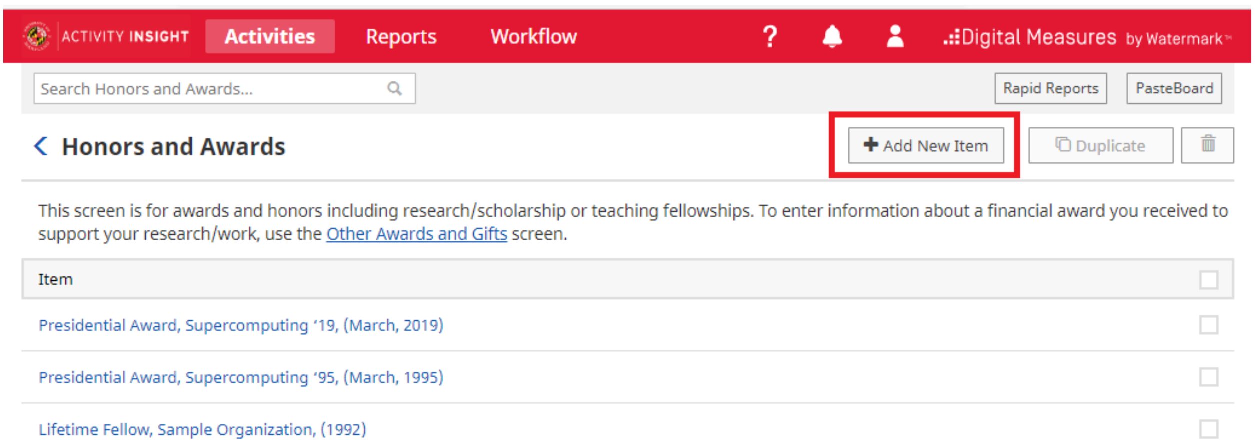
Mentorship – Guiding Professional Development	Office of Faculty Affairs	November each year	2020 – present	Manual updates permitted
Patents	UM Ventures	January and July each year	2020 - present	Manual updates permitted
Inventions	UM Ventures	January and July each year	2020 - present	Manual updates permitted
Teaching Innovation	TLTC Teaching Innovation Grants Final Reports	November of each year	2020 – present	Manual updates permitted
Continuing Education	TLTC design sprints UMD ADVANCE programs	November each year	2020 – present	Manual updates permitted

Activity Screens: The Basics

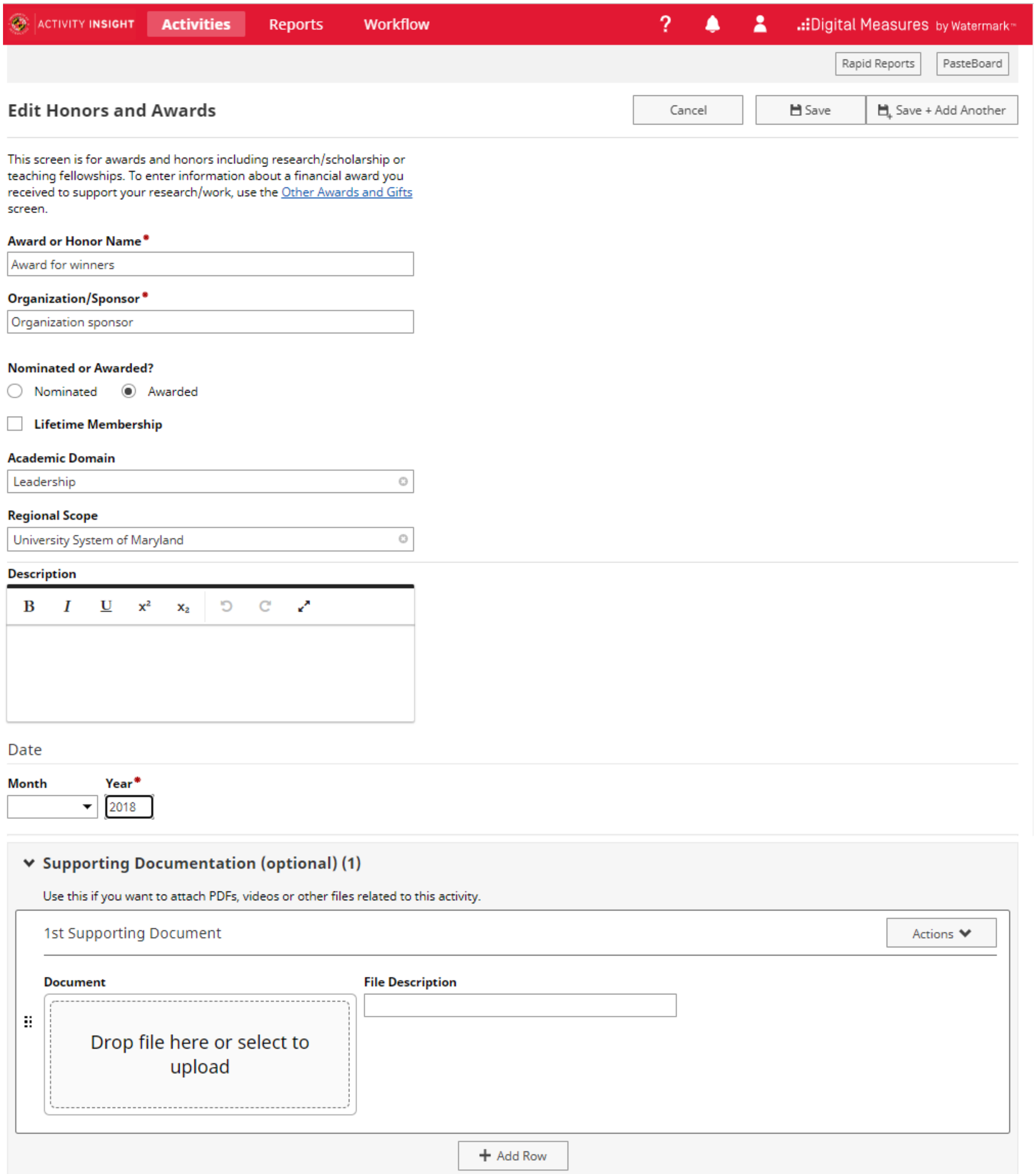
After clicking on an activity screen, you will see a summary screen showing your preloaded or manually entered activities. The screenshot below shows the summary screen for the Honors and Awards activity screen.



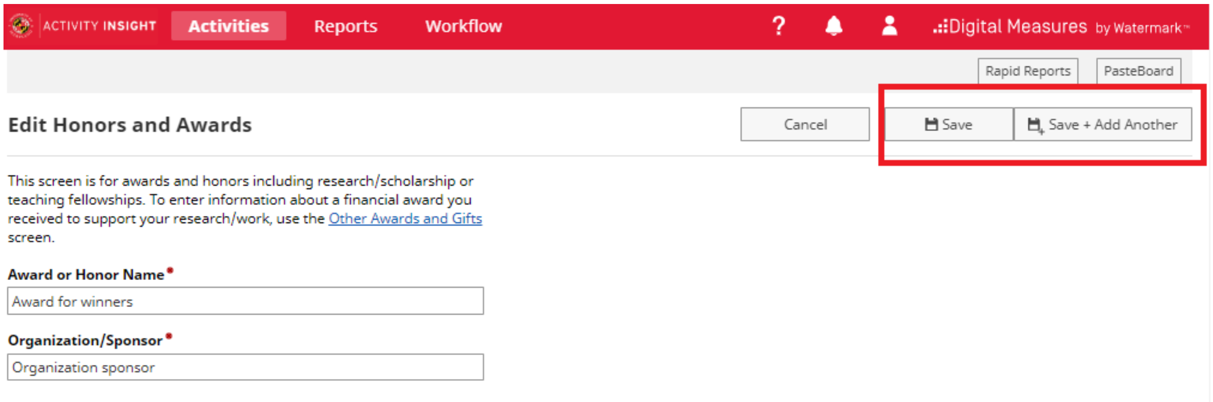
You can click an existing record to edit it, or you can click the *Add New Item* to create a new record. Either option will bring you to the Data Entry screen.



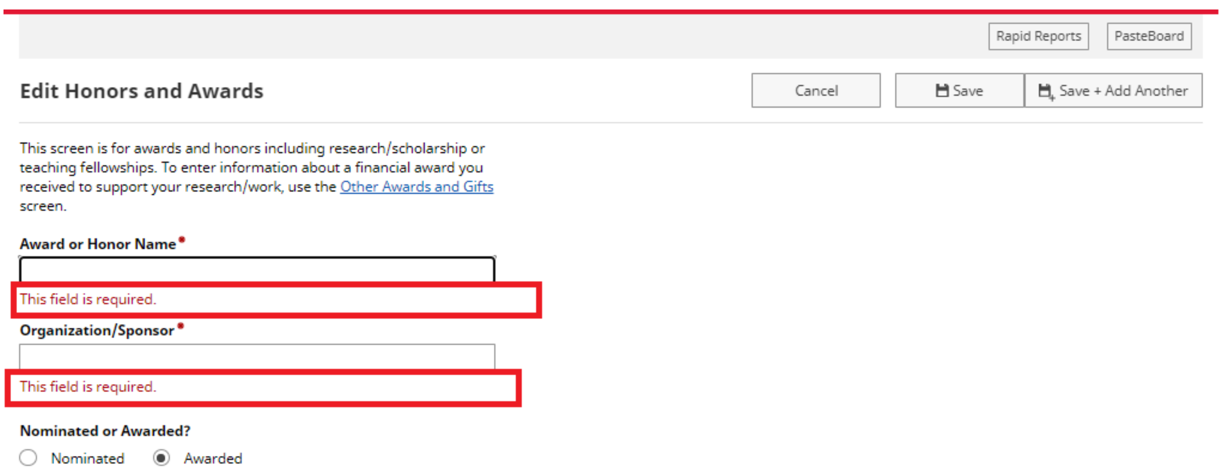
Here you should fill in all of the required fields (denoted by red asterisks) and as many of the optional fields as you would like. The dates are very important for activities and thus are required even not highlighted. Please ensure that you have at least filled out a month or a year of one of the date fields.


ACTIVITY INSIGHT
Activities
Reports
Workflow
Digital Measures by Watermark
Rapid Reports
PasteBoard
Edit Honors and Awards
Cancel
Save
Save + Add Another
This screen is for awards and honors including research/scholarship or teaching fellowships. To enter information about a financial award you received to support your research/work, use the Other Awards and Gifts screen.
Award or Honor Name*
Award for winners
Organization/Sponsor*
Organization sponsor
Nominated or Awarded?
Nominated
Awarded
Lifetime Membership
Academic Domain
Leadership
Regional Scope
University System of Maryland
Description
Date
Month
Year*
2018
Supporting Documentation (optional) (1)
Use this if you want to attach PDFs, videos or other files related to this activity.
1st Supporting Document
Actions
Document
File Description
Drop file here or select to upload
Add Row

Then save your entry with the Save button at the top of the screen.



If your activity is not saved, please check the activity page for any error messages like **"At least one date is required."** or **"This field is required"**. These messages appear just below the field with the associated error.

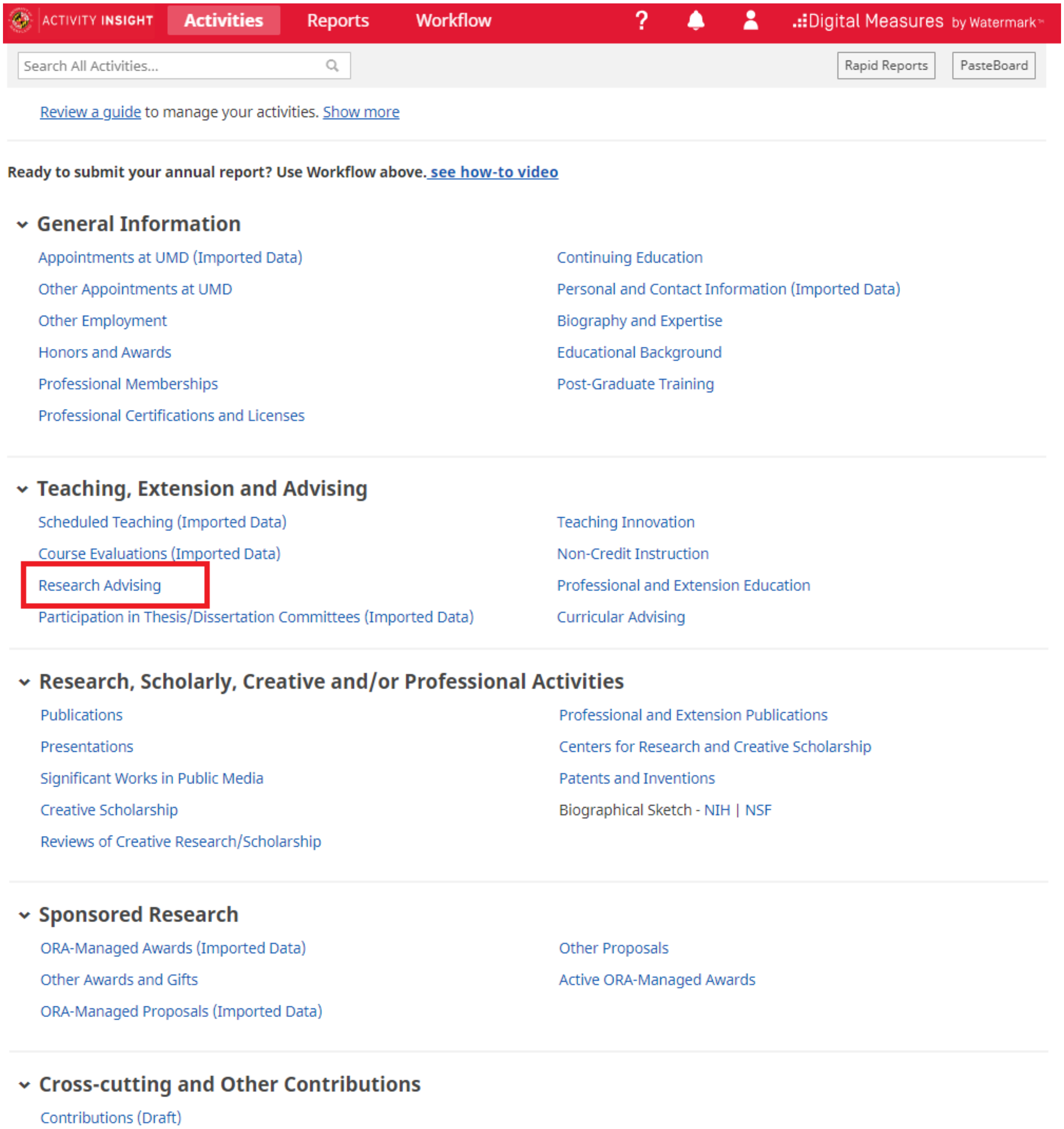


Adding an Item

Items represent any activity, entry, service, or record that is added to one of the various sections within Faculty Success.

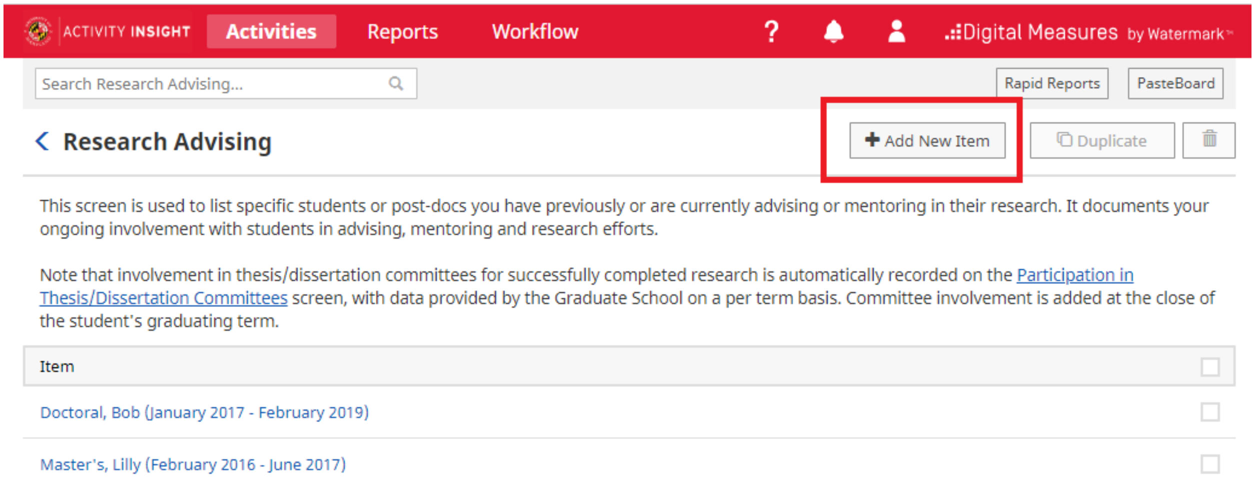
Activity screens in Faculty Success have been customized for UMD based on the UMD Vita template and the annual activity report.

Choose any link on the main Activities screen to go to the summary screen for that activity. From there, you can add new activity items.



When you click a link you will first see a summary screen. Here you can see all of the activities that have already been loaded or that you have entered.

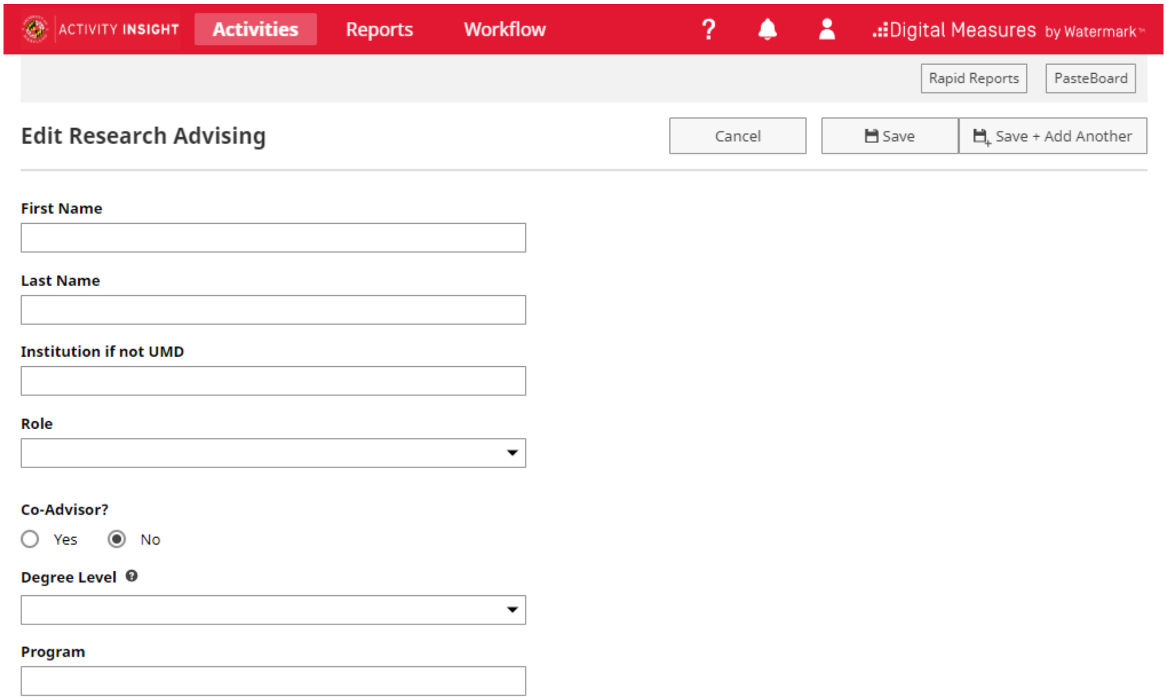
To add an activity click "Add New Item" in the upper right.



This is the data entry screen. Notice that required fields have a red asterisk. The dates are very important for activities and thus are required even not highlighted. Please ensure that you have at least filled out a month or a year of one of the date fields.

Note: you want to fill in your information based on how you want it to look on reports, so be sure to use proper capitalization and punctuation in all fields.

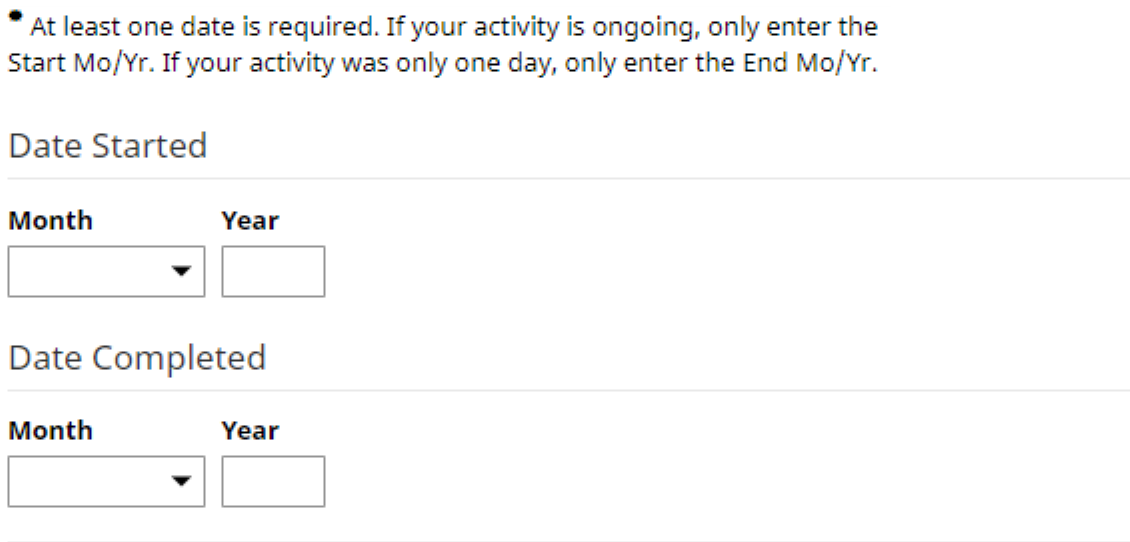
Also keep in mind, these screens are designed to be used by faculty from all disciplines across campus, so some screens may have fields that don't pertain to you. You can either leave those fields blank, or if the field is required, fill it in with the most logical option for your department.



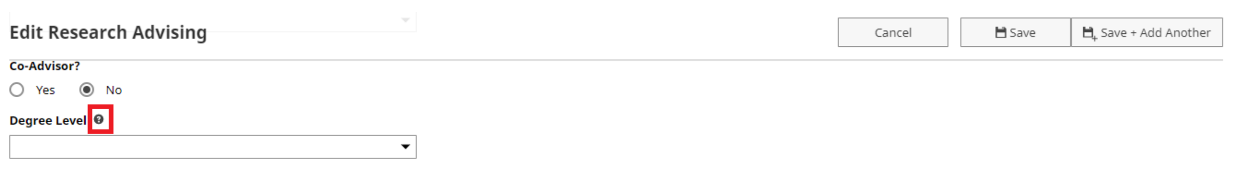
Date Handling in Faculty Success

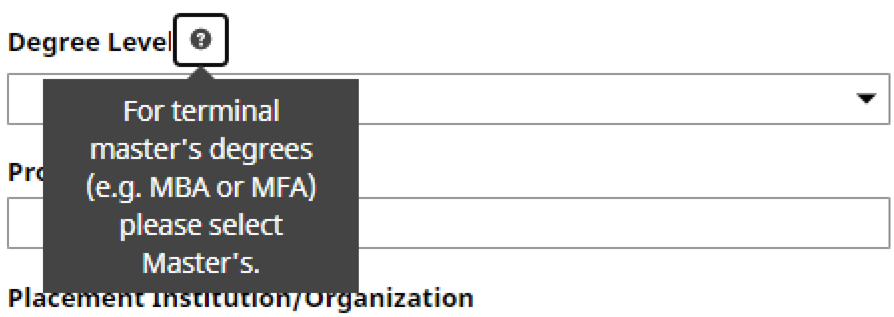
For reporting to work properly, and for activities to be properly organized on reports, entries must have dates. Most screens will have two spaces for each date, one for month and one for year. The day is very rarely asked for. The date format in Faculty Success is [Month Name] YYYY or [Month Name] DD, YYYY, if the day is included.

For activities that are ongoing, only enter the start date, and leave the end date blank. If the activity was only one day, or a period of time within the same month, enter the end date and leave the start date blank.



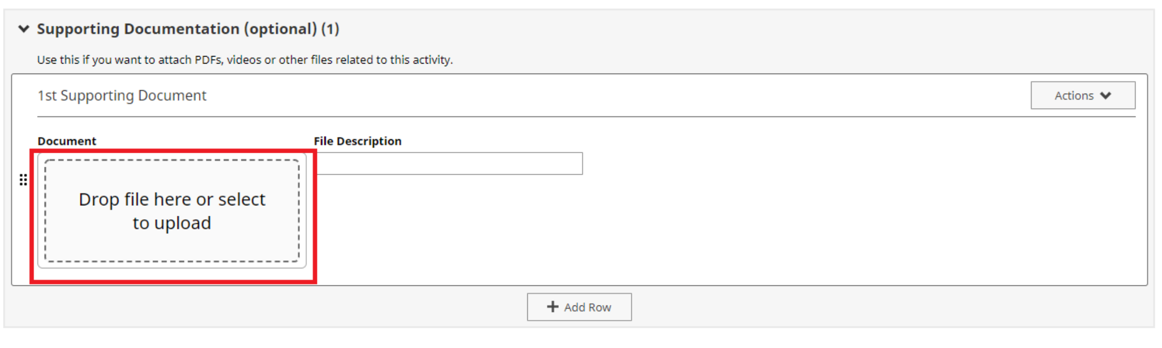
Some fields have additional help available through the ? help icon. In other cases, on-screen instructions provide guidance on how to enter data for the associated field(s).



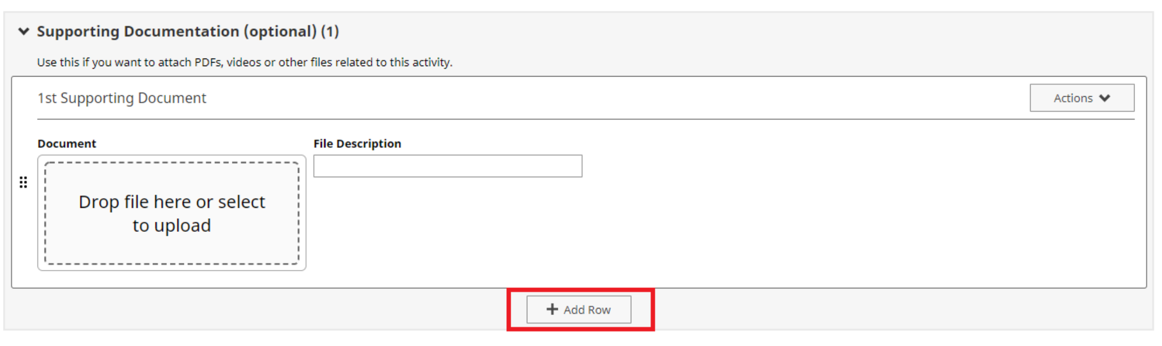


After filling in all required information, you may choose to add Supporting Documentation. This is completely optional. This is a way to store PDFs, videos or other files related to this activity.

To add supporting documentation, you can either drop the files or choose an option to upload under Supporting Documentation.

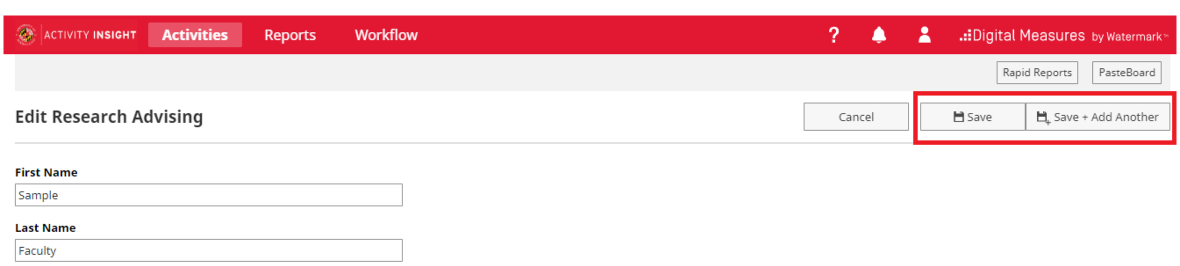


You can add any file type you would like here, as long as it is 10 MB or less. If you would like to add multiple documents, you can click the "+Add" button on the bottom right and repeat the file upload process for each additional file.



Once you have added all of your information and documents you can click "Save" at the top of the page. This will take you back to the summary view of all of your entries for this activity screen.

*Important Note: Remember to **Save**. Click on the Save button after completing all the fields. If your activity is not getting saved, please check the activity page for any error messages like **"At least one date is required."** or **"This field is required"**. These messages appear just below the field with the associated error.*



Curating/Editing an Item

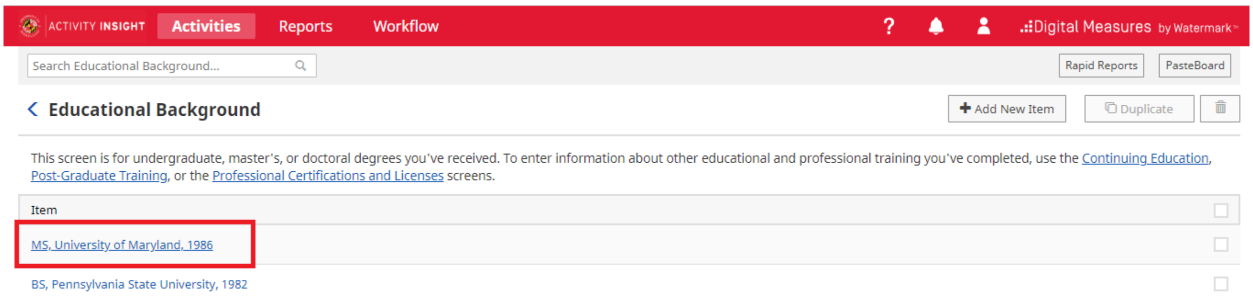
As you initial start using the system, you may encounter pre-populated activity data in a number of activity screens. Some screens' data is populated through integrations with other campus systems - PHR, SIS, CourseEvalUM , Kuali Research, Graduate School, UM Ventures, UMD ADVANCE, TLTC and Faculty Affairs. You may also see data that was pulled from the Lyterati system and loaded into Faculty Success.

Data populated from the PHR, SIS, CourseEvalUM, Kuali Research and Graduate School campus integrations cannot be edited on the data screen. Check below to see how to get changes made, if needed:

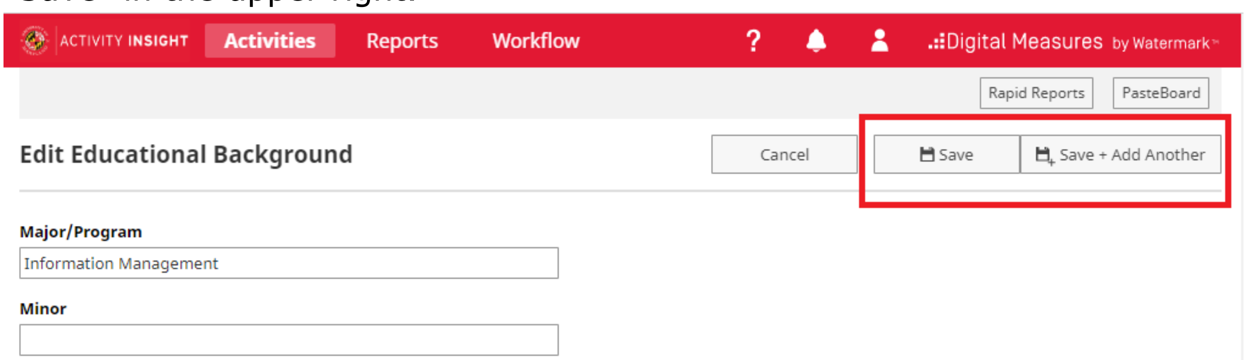
Activity Screen Name	**Contact Information for Updates/Changes**
Personal and Contact Information Tenure and Rank Appointments at UMD	Use PHR Verification to make corrections in the Personal and Contact Information. If any other changes are needed contact your unit's PHR coordinator.
Scheduled Teaching	If you want to have a change made in the scheduling system, please contact your scheduling officer.
Course Evaluations	If you have questions about the data on this screen, contact the CourseEvalUM Help Center.
Active ORA-Managed Awards ORA Managed Awards ORA Managed Proposals	Requests for corrections to Kuali Research for any active projects can be made through your department's business administrator.
Participation in Thesis/Dissertation Committees	Faculty Success Team (dm-help@umd.edu)

Other screens may have data that was pulled from the Lyterati system. Every effort was made to bring this data in cleanly and to populate the correct set of fields. However, you should review the data loaded on these screens to make sure that the information has been correctly mapped and that the data for your activities is accurate.

If you need to make changes to any of your pre-loaded activities, or any activities you have entered, you can locate the record you want to edit and click on the link to view it.

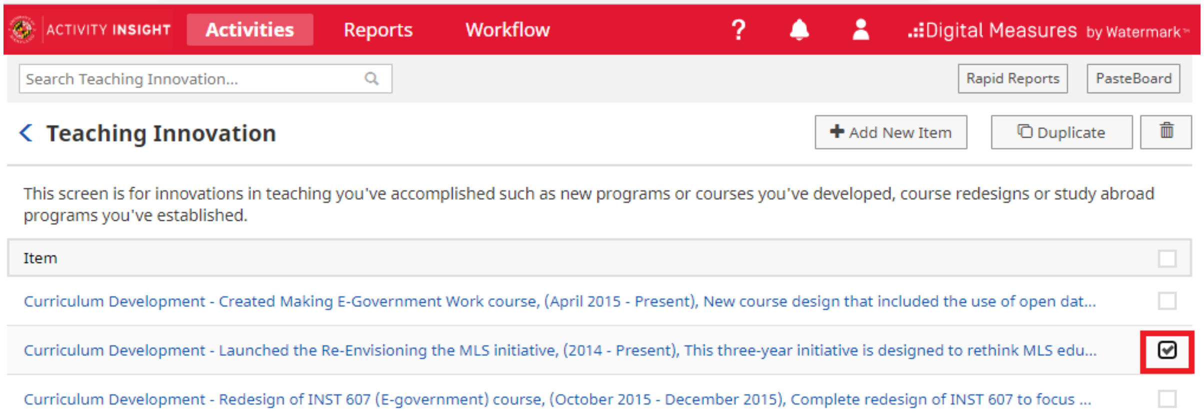


Make any necessary updates to the data entry screen. Remember that all required fields(marked with an asterisk) must be filled in. Once finished click “Save” in the upper right.

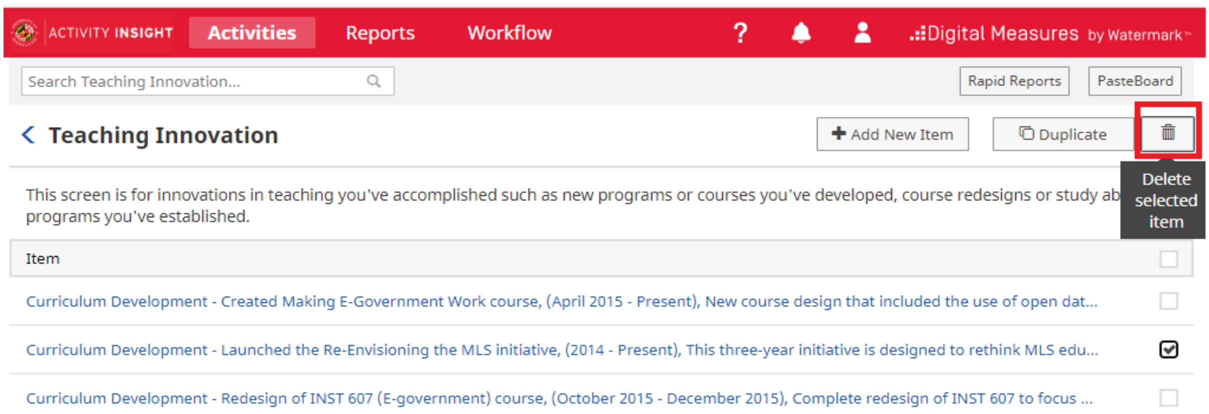


Removing an Item

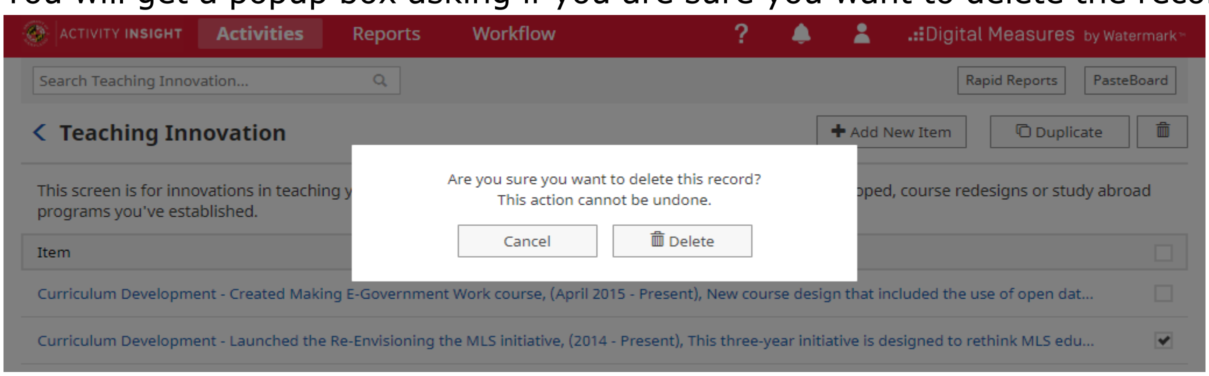
There may be times when you need to delete activities that have been duplicated or added in error. To do this, simply go to the summary screen where the record is located and select the record you want to delete by clicking the checkbox for that record:



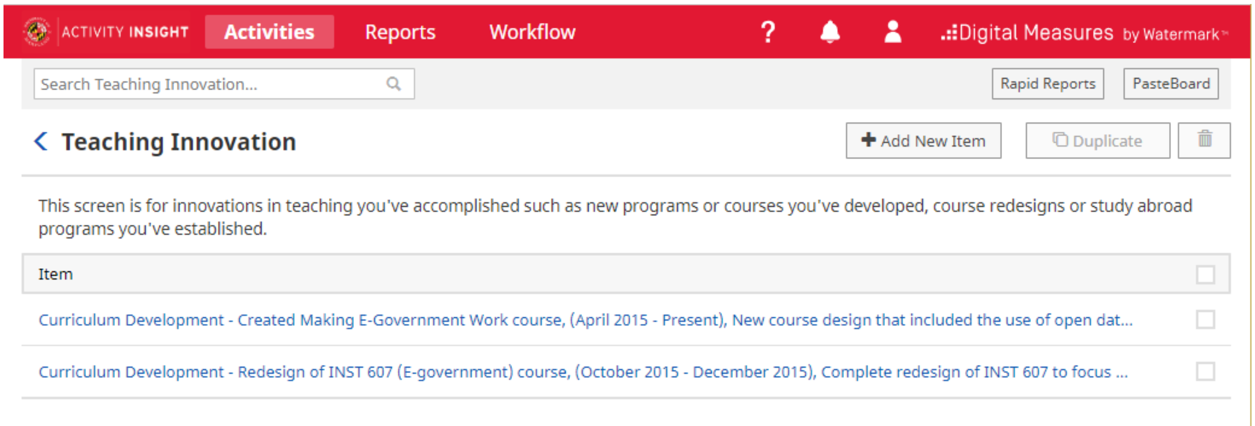
Once you have selected the record/records you want to delete, click the trash can icon on the upper right.



You will get a popup box asking if you are sure you want to delete the record.



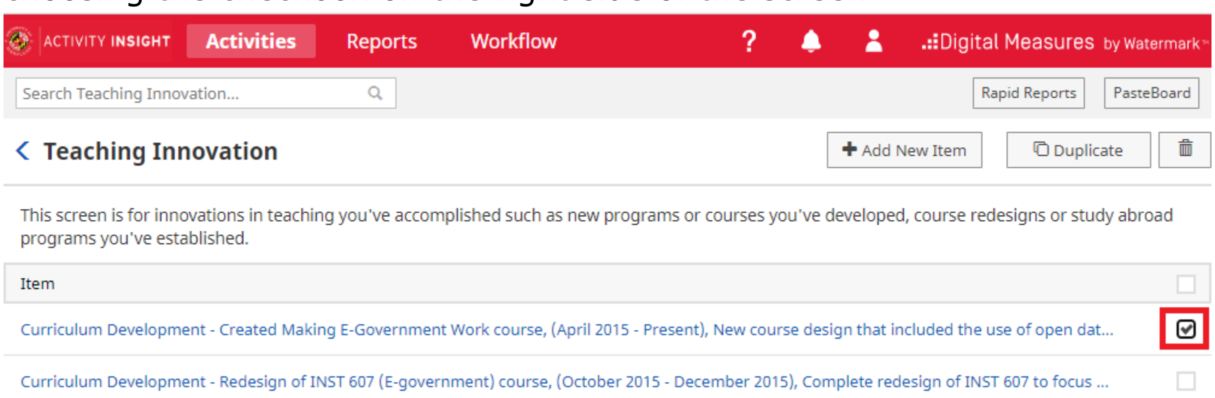
Select Delete. Now you will see that your record has been removed from the summary screen.



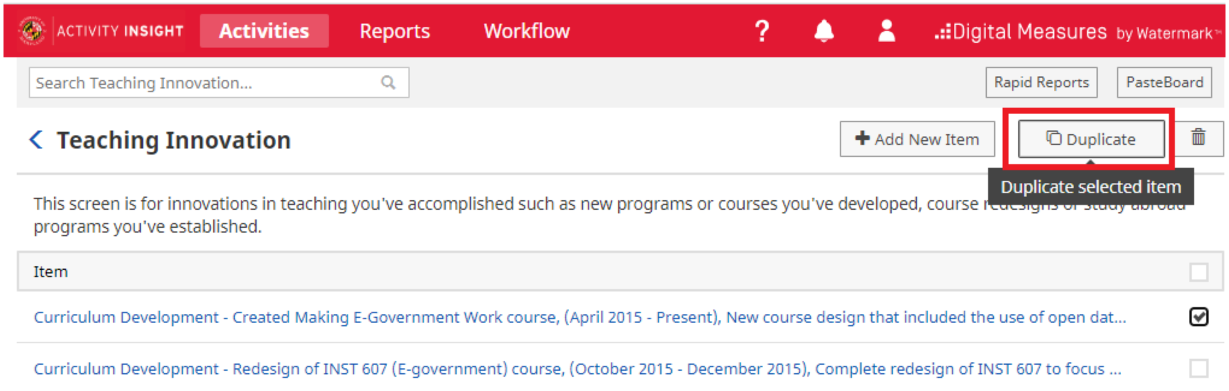
Duplicating an Item

Sometimes you can save time adding activities by using the Duplicate feature. In some cases where there are two items that are almost identical, you may find it easier to duplicate one and then slightly modify it, as opposed to creating the second item from scratch.

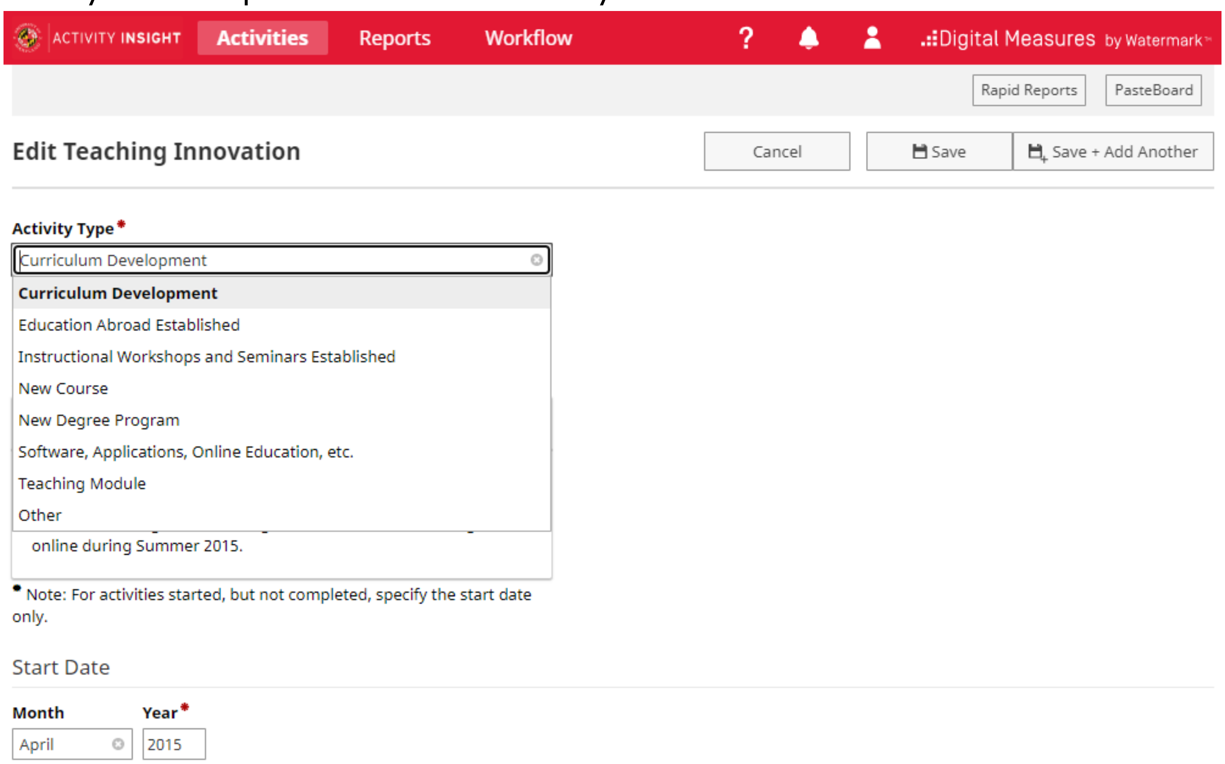
On the summary screen, choose the activity you want to duplicate by choosing the checkbox on the right side of the screen.



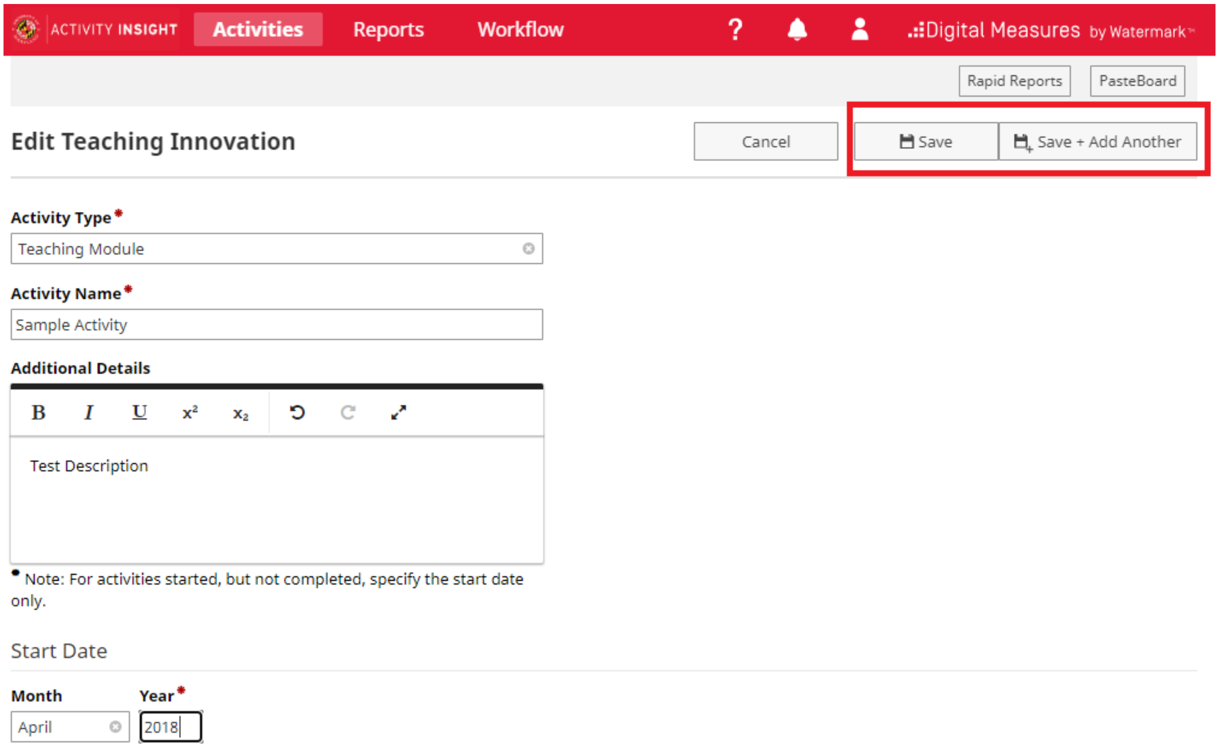
Then click Duplicate in the upper right.



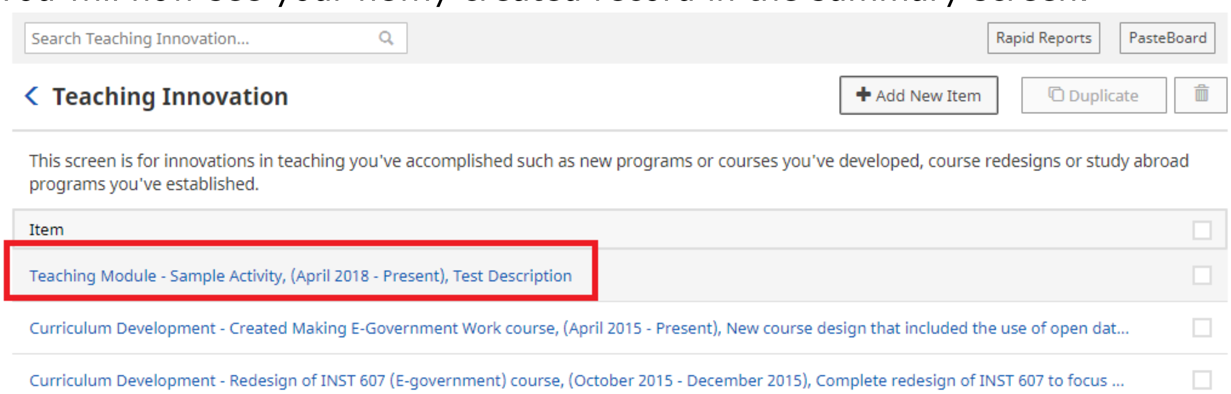
Now you can update information for your new record.



Once you have updated all desired fields, click the Save button in the upper right.



You will now see your newly created record in the summary screen.



Sending Bulk Import Request for the Activities

If you have your activities data stored in Excel file, you can contact Faculty Success team(dm-help@umd.edu) with the request details for bulk import option. You will be provided with an Excel import template for the associated data screen. The columns of the template will correspond to the data fields on that screen and the detailed information on the data format for each column will be provided. You will need to follow the instructions and share the completed template with Faculty Success team to perform the data load.

Note: Keep in mind that the timeliness of the data load with this service is dependent on the volume of requests that the Faculty Success team is handling at the time of your request.

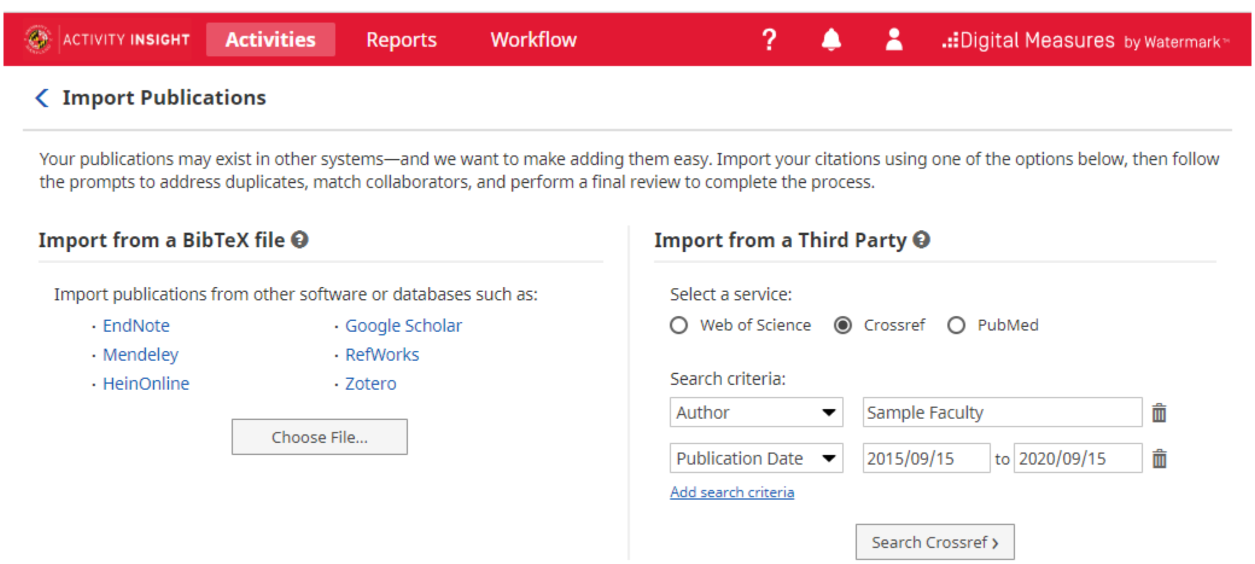
Importing Publications

Overview

The Publications screen is for managing a wide variety of research and scholarly publications.

The Import Publications feature can be used to import citations directly from a number of publication databases, as well as through an uploaded BibTeX file generated from other citation managers such as Zotero, EndNote or Mendeley.

Citation Managers are typically used to manage resources that you find while doing research, in anticipation of then citing those references while writing. They can also be used to create personal publication libraries, which can then be exported as BibTeX files to import into Faculty Success.



There is no single foolproof import method to recommend for faculty across the campus. Each option has advantages and disadvantages, depending on your area of research interest and publication activity.

The **Import from a Third Party** approach, on the right side of the Import Publications screen has the following pros and cons:

- Pros: Data is pulled directly from the selected publication database or researcher profile into Faculty Success
- Cons: Each of the integrated publication databases covers different disciplines in varying degrees. For example, PubMed will include a high percentage of public health publications, but very little in social sciences or humanities. None of these resources will work equally well for all faculty members.

The **Import from a BibTeX file** approach, on the left side of the Import Publications screen has the following pros and cons:

- Pros: More control for faculty as to which publications are included in the BibTeX file, allowing for broader coverage across disciplines.
- Cons:
  - Two step process to export BibTeX file and then upload the file into Faculty Success
  - Some citation managers are limited in regards to which pieces of data are stored and/or exported to the BibTeX file.

For the BibTeX upload, Zotero, EndNote, or Mendeley reference managers can be used to curate personal citations and generate a BibTeX file for uploading. The AnyStyle.io citation parser is another option; copy citations from your CV into AnyStyle.io and choose the BibTex output format.

The Libraries offers a detailed guide on this topic, Preparing for Digital Measures: Creating and Curating a Scholarly Profile.

Importing is Just the First Step...

While these import options greatly ease the burden of entering publication activity, additional manual effort will likely still be needed:

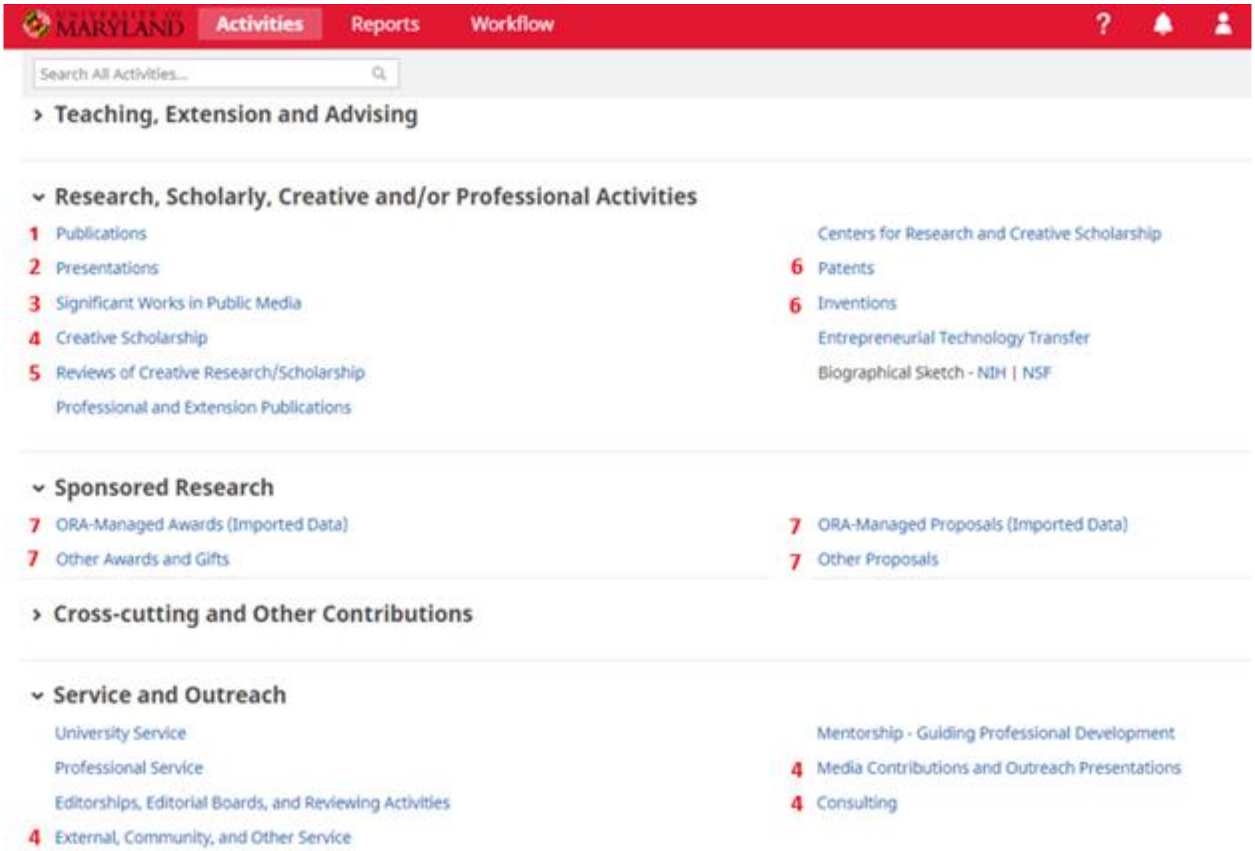
- The Import feature only handles a subset of the possible types of publications that faculty are involved in
- Most of the time, when publications are brought in through the Import feature, key details about the publication will be imported. Depending on the quality of the source data, things like page numbers, special characters, URLs, etc. may not appear correctly, and may need to be corrected manually.

Consult the detailed guide for more assistance and best practices on this topic, Preparing for Digital Measures: Creating and Curating a Scholarly Profile.

Adding/Updating Collaborators on an Activity

Faculty can add or update other collaborators on an activity within certain sections of the **Research, Scholarly, Creative and/or Professional Activities; Sponsored Research;** and **Service and Outreach** categories. Other collaborators may be added/updated to activity in one of the following ways:

1. As an Author / Editor to a Publication
2. As an Author / Presenter to a Presentation
3. As an Author / Collaborator to a Significant Work in Public Media
4. As a Collaborator to a Creative Scholarship, Center for Research and Creative Scholarship, External, Community or Other Service, Consulting, or to a Media Contribution and Outreach Presentation
5. As a Reviewer for a Review of Creative Research/Scholarship
6. As an Inventor to a Patent or an Invention Disclosure
7. As an Investigator to a Proposal or Award

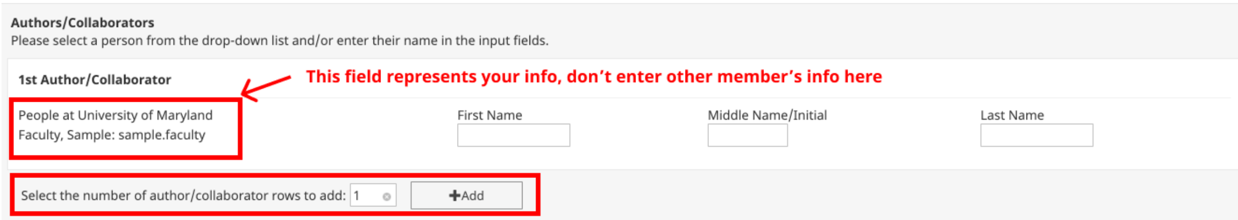


To add/update another member of an activity, navigate to the associated activity screen. Then, click on the Add New Item or select a record on the summary screen to drill down into the item detail.

When manually adding an activity to the following screens, the first member will always be you and this is defaulted to show your user name, first and last name as it appears in UMD's system.

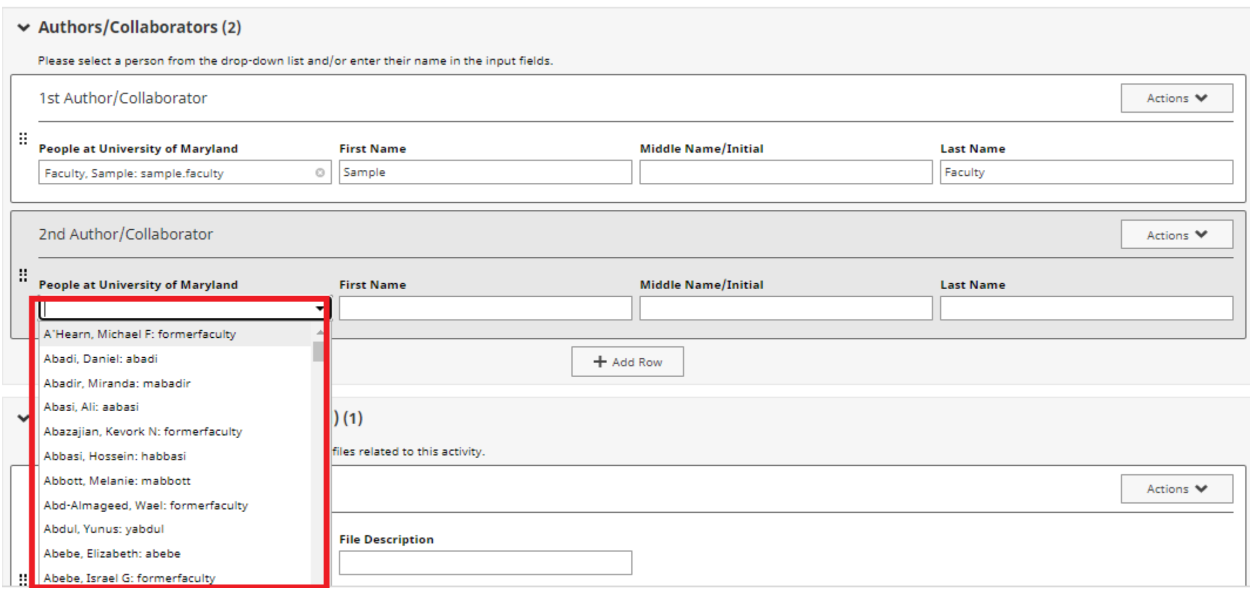
- *Presentations*
- *Significant Works in Public Media*
- *Patents*
- *Innovations*
- *Entrepreneurial Technology Transfer*
- *Other Awards and Gifts*
- *Other Proposals*
- *Media Contributions and Outreach Presentations*

You have the option to "override" or use a pen name by entering a different first/last name in the data fields of your row. If you have additional authors, skip down below and select the number of "Other Collaborators" rows you wish to add and click on the **+***Add button.*



The "Other Collaborator" will be labeled as the "2nd" contributor/author. Their information can be inputted in one of two ways:

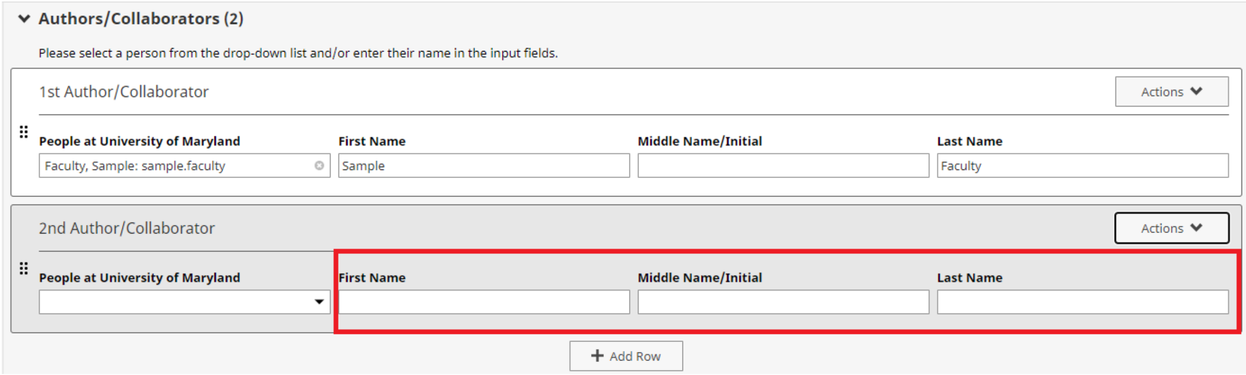
1. If the other member is UMD faculty, you will be able to find them in the first drop down text box by entering their user name, first name, or last name:



OR

2. If the other member is <u>not</u> associated with UMD or if their user name is not listed in the dropdown, enter their information in the text boxes (First Name, Middle Name/Initial, Last Name, Institution/Company, Role) as outlined in the screenshot below. If the collaborator is an organization and not a specific person, enter the organization's name

in the Last Name field.



Author/Editor Annotations with Publications

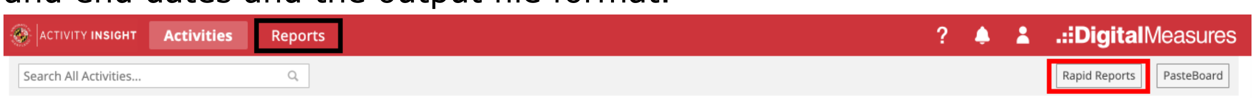
Additional parameters are available with the author/editor data on the Publications screen.

- The corresponding author(s) can be identified. In reports, they will be denoted with a hash mark (#) after their name.
- If desired, the Bold My Name checkbox can be selected to ensure that in generated report, that name will appear in bold within the citation.

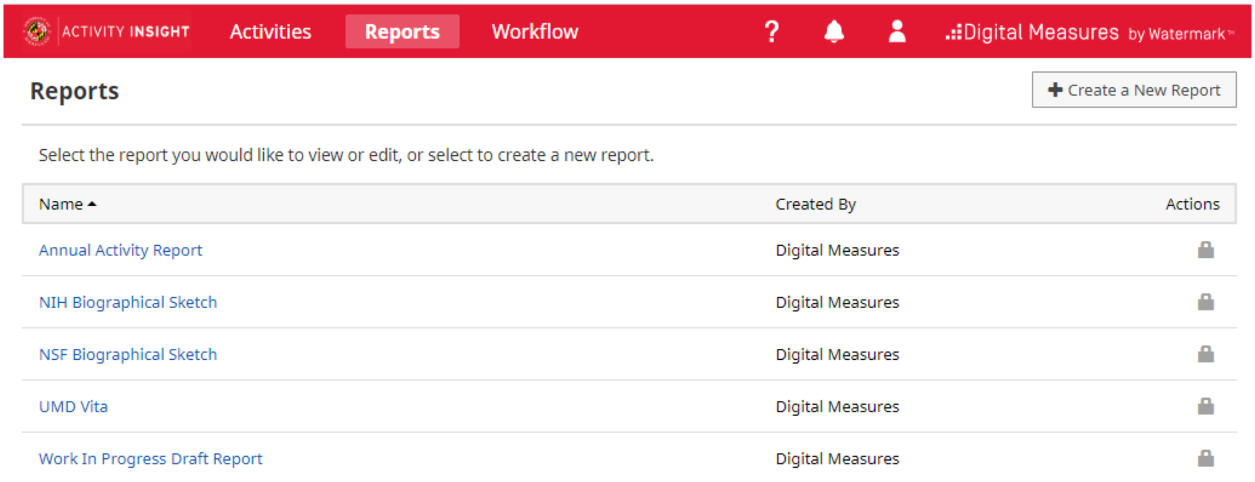
Faculty Annual Activity Report Generation

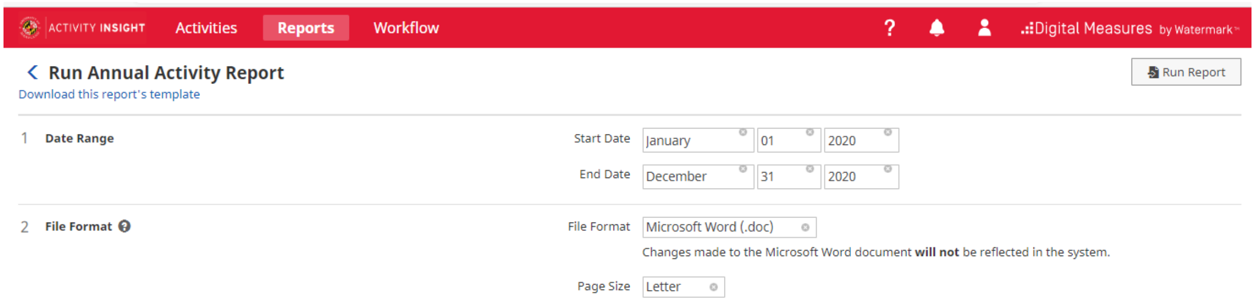
A number of reports in Faculty Success are custom-built for UMD use. There is a custom report available for annual activity reporting.

You can access and generate reports using either the Reports tab in the navigation bar or Rapid Reports option. Select the report type to run, the start and end dates and the output file format.

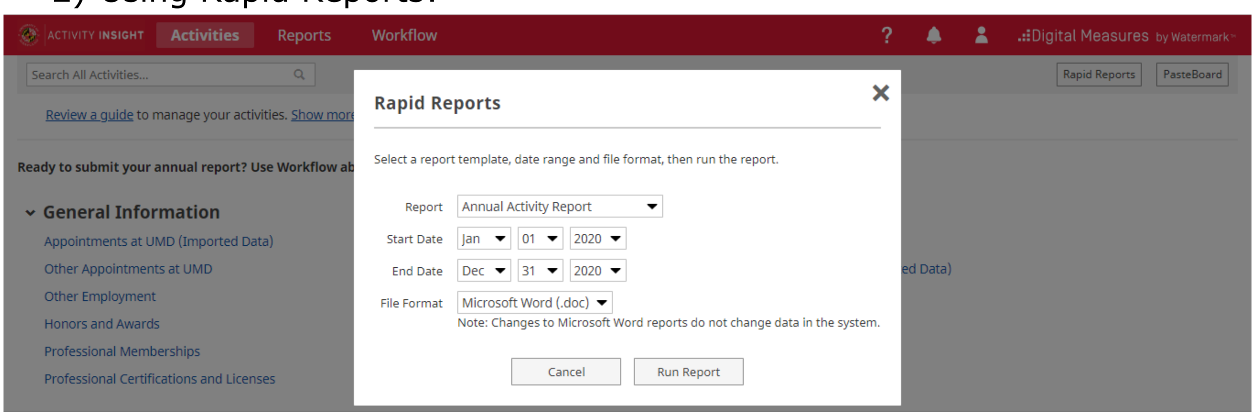


1) Using Reports tab:





2) Using Rapid Reports:



The dates identify a time window; the report will include activities that occurred during this window. The default is the current calendar year.

Reports can be generated in Word, PDF or HTML formats.

After clicking Run Report, the report will be generated and downloaded. Based on the browser, you will receive a notice when the download is complete.

Open the document to see the generated report.

Note: changes made to the downloaded report document will not be reflected in the Faculty Success system. To get correctly formatted reports, you should edit/curate your activities in the Faculty Success system. To help you with successful annual report completion, we have included an Annual Report Data Fields guide that maps each section of the report back to the relevant screen in Faculty Success where the data is drawn from.

Troubleshooting Issues with Reports

Here are some common challenges that arise when activities are first included in a report and ways to address them.

- **Publications show up in the wrong section of the report**: This happens when the Contribution Type field for the publication has not been set, or is set to "Other." To correct this and ensure your publications are routed to the correct sections of your report, you will need to curate those records.

  To do this, navigate to the summary screen for your publications. You will notice that each record will display, from top to bottom: the publication type, the title, the current status, and the date published. Any records that list only the title, status, and date, are the records that do not have a publication type selected. You can go into these records individually, select the correct Publication Type from the dropdown, and then save the record by clicking "Save" in the upper right.

  Also, the Annual Report Data Fields guide may offer insights on the publication types associated with each section of the Annual Activity Report.

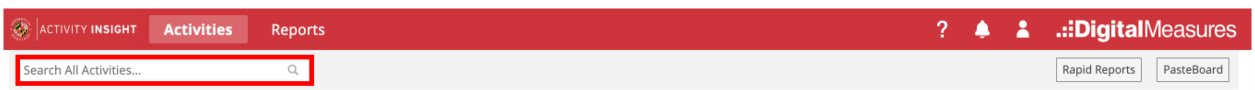
  If you have already ensured that all of your publications have a Publication Type selected, but you still have publications showing up in the "Other" section of your report, those publications have "Other" selected for the publication type, and are displaying the "Explanation of Other" on the summary screen. If you would like to make sure that these publications are routed to a particular section of your report, rather than "Other Publications," you will need to go into those records

individually and select a Publication Type other than "Other," and delete the information in "Explanation of Other," and then save the record.
- **Activities from outside of the dates selected show up in the report**: Check that dates have been set for the activity.

Timesavers

Take a look at the following useful features to streamline your Faculty Success experience.

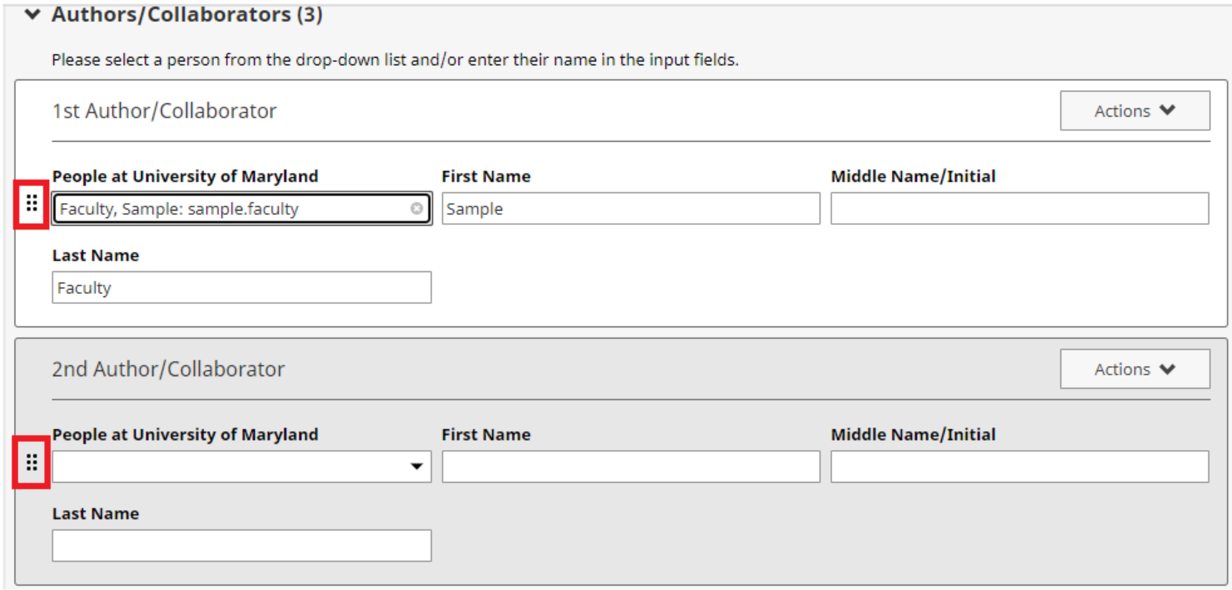
Keyword Search



The Search function is always available at the top of all Faculty Success screens. This is a Keyword Search, which means it will find all activities/items that contain that word in any field and/or file attachments. You can use the search to quickly find items when unsure of which section they may be in.

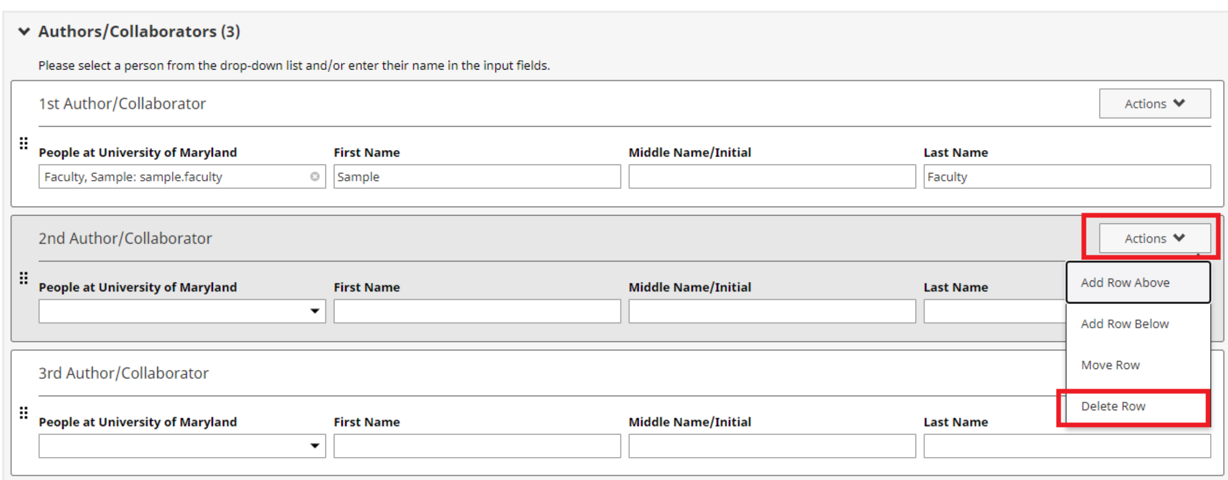
Author Reordering

Publications/Scholarship of Discovery items default the faculty as the 1st Author/Editor. To change the ordering of the authors, use the ⠿ at the very left of the author section (next to the People at University of Maryland field) to drag and drop the authors in the desired order.



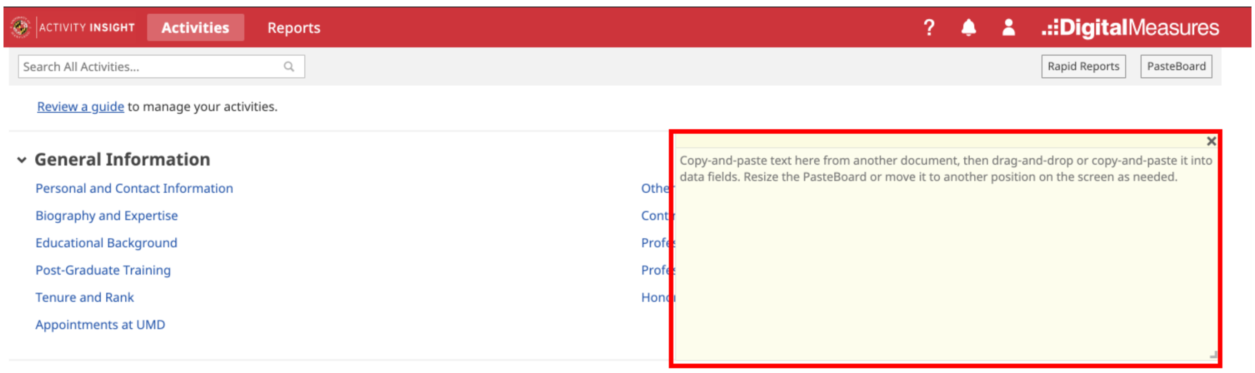
Author Deletion

Remove an author/editor by clicking on the *Actions* dropdown in far right corner of the author's row. Select *Delete Row* from the options.



PasteBoard

The PasteBoard feature allows you to bring in text from a word processing application (e.g., MS Word) and "standardize" for pasting into Faculty Success. Simply, copy text from another document and paste it into the PasteBoard. After you have pasted the text into PasteBoard, you can then select all (Ctrl/Cmd + A) or parts of text from it, click-and-hold on the text you selected, and drag it into a text field in the system to have it pasted into the field. You may also use the inherent Copy (Ctrl/Cmd + C) and Paste (Ctrl/Cmd + V) functions.



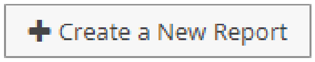
To access the PasteBoard, click **PasteBoard** in the *Navigation Menu* under Manage Activities. The PasteBoard will appear in the bottom right-hand corner of your screen and can be dragged anywhere on the screen as needed. Any text in the PasteBoard upon logging out will remain in the PasteBoard for future sessions.

Creating Custom CVs

Faculty have the ability to generate a CV in the standard UMD Vita format, known as a "UMD Vita" in Faculty Success, through either the Reports or Rapid Reports features. [To better understand how the UMD Vita report in Digital Measures currently supports the University CV template, refer to the UMD CV Generation Using Faculty Success reference document.]

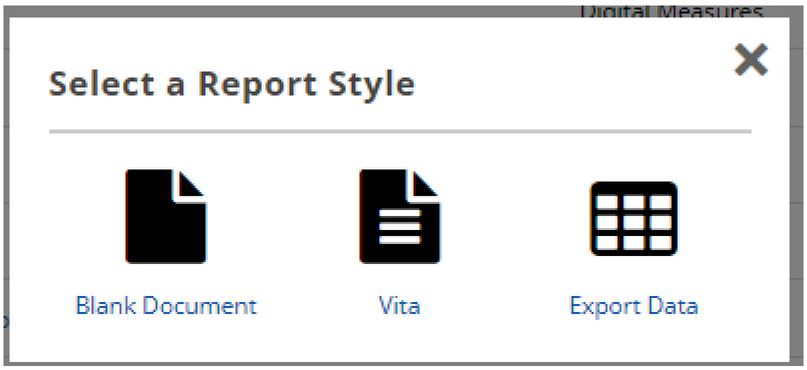
Additionally, faculty can also create customized CVs that vary from the standard vita, for personal and professional uses. Custom CVs are created using intuitive features such as drag and drop, word/format editors, and record filtering. To create a custom CV based on the default template provided by Faculty Success, follow the steps below.

1. Click on the **Reports** link in the main navigation menu.


2. Click on the 

button in the upper right area of the Reports screen.

3. Choose the **Vita** option when selecting the report style to begin with the default CV template. Selecting this option is the easiest and fastest way to customize your CV.



Note that the **Blank Document** style option provides access to the same tool as the **Vita** style option, but without any default report elements in place. It can be used to build up a custom CV from scratch.

4. Your CV will be auto-populated on the next screen based on your data in Faculty Success and the default CV template.

5. There are a variety of ways to customize your CV, including but not limited to those outlined below. Faculty Success has published content on how to customize your CV, including a video tutorial. Links to the Faculty Success' resources are embedded below:

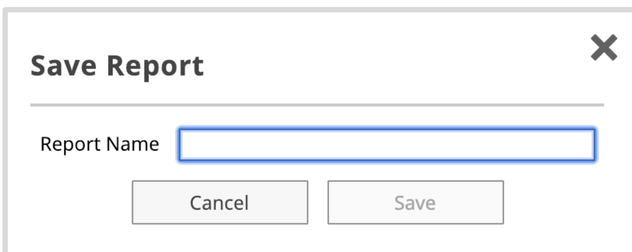
    a. Reformatting your CV
        i. Reordering using Drag and Drop
        (04:33 – 05:00 of the video tutorial)
        ii. Adding or removing Activity Sections and headers (5:10 – 5:54 of the video tutorial)
        iii. Adding a Text-Only Section (no activity records)

    b. Filtering Data displayed in Activity Sections

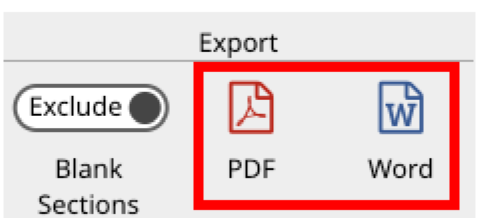
    i. Click on the Settings gearwheel to filter the activities displayed in each section
    ii. Breaking out Publications
    (06:29 – 7:25 of the video tutorial)

  c. Applying a Date Range
    i. Specify certain years and dates of data that should be included on your CV.
    (3:33 – 3:45 of the video tutorial)
    ii. Choose to override (not apply) date ranges to certain sections: (7:26 – 7:45 of the video tutorial)

6. Once you have finished customizing your CV, you should save it for future iterations. Click on the **Save** button near the top right corner of the screen and enter a name for the new CV.



7. To download a PDF or MS Word copy of your newly created CV, click on the **PDF** or **Word** icon (respectively) under Export in the top right area of the screen.



8. After you have saved your CV, it will appear in your list of Reports under **Reports.** You may wish to modify the CV, and you can do so by clicking on it. You may also wish to *duplicate* or *rename,* which you can by clicking on the down arrow.
  a. Duplicate your CV
  b. Rename your CV

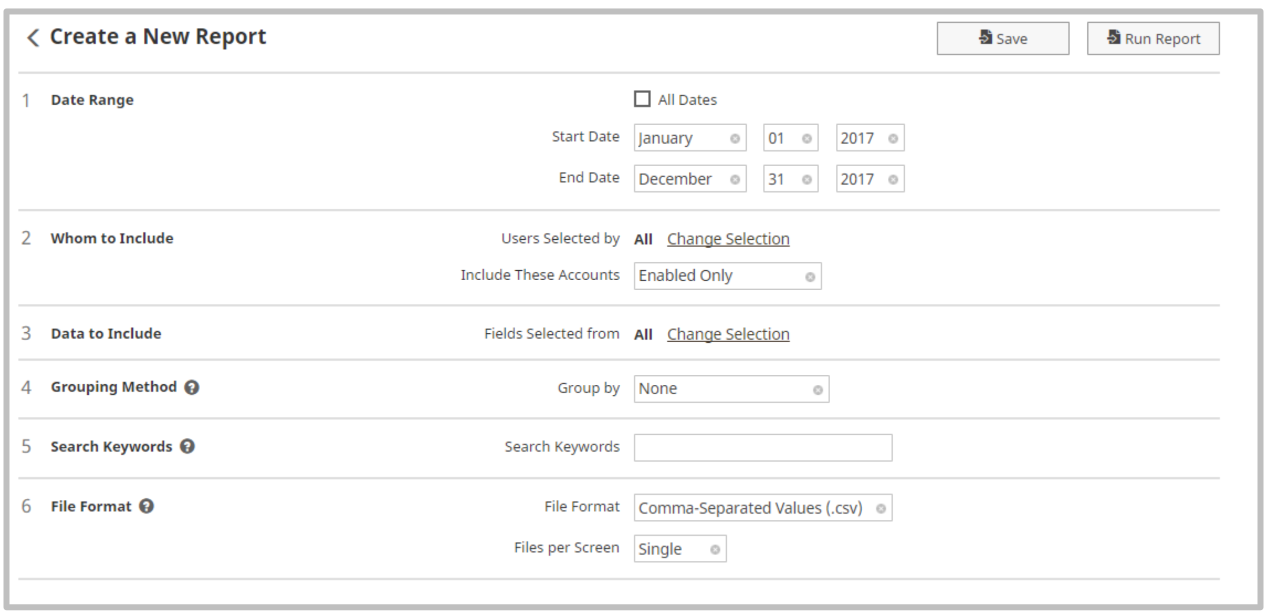
Faculty Success Video Tutorial: https://www.digitalmeasures.com/activity-insight/docs/reporting.html

Exporting Activity Data

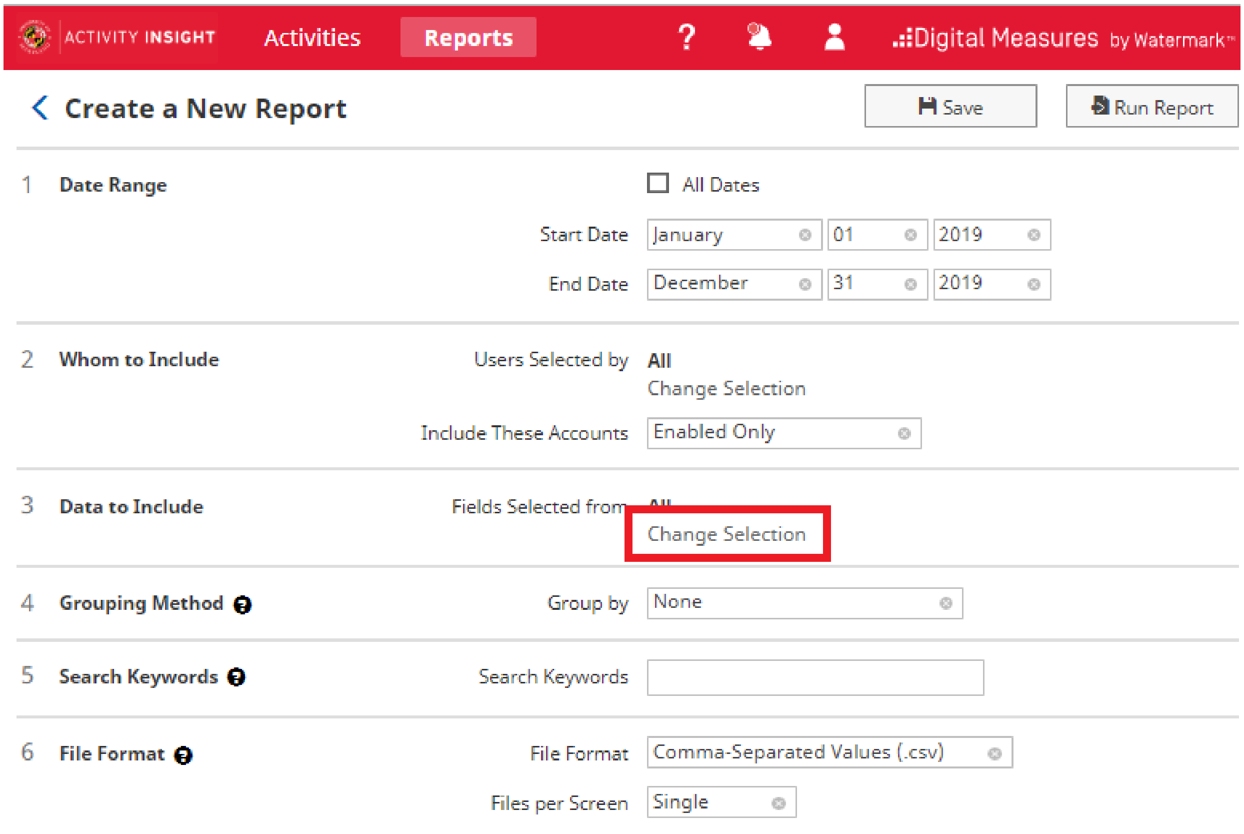
The third style option available from the **Create a New Report** option on the **Reports** screen is **Export Data.**

The **Export Data** style lets you set up a new report that:

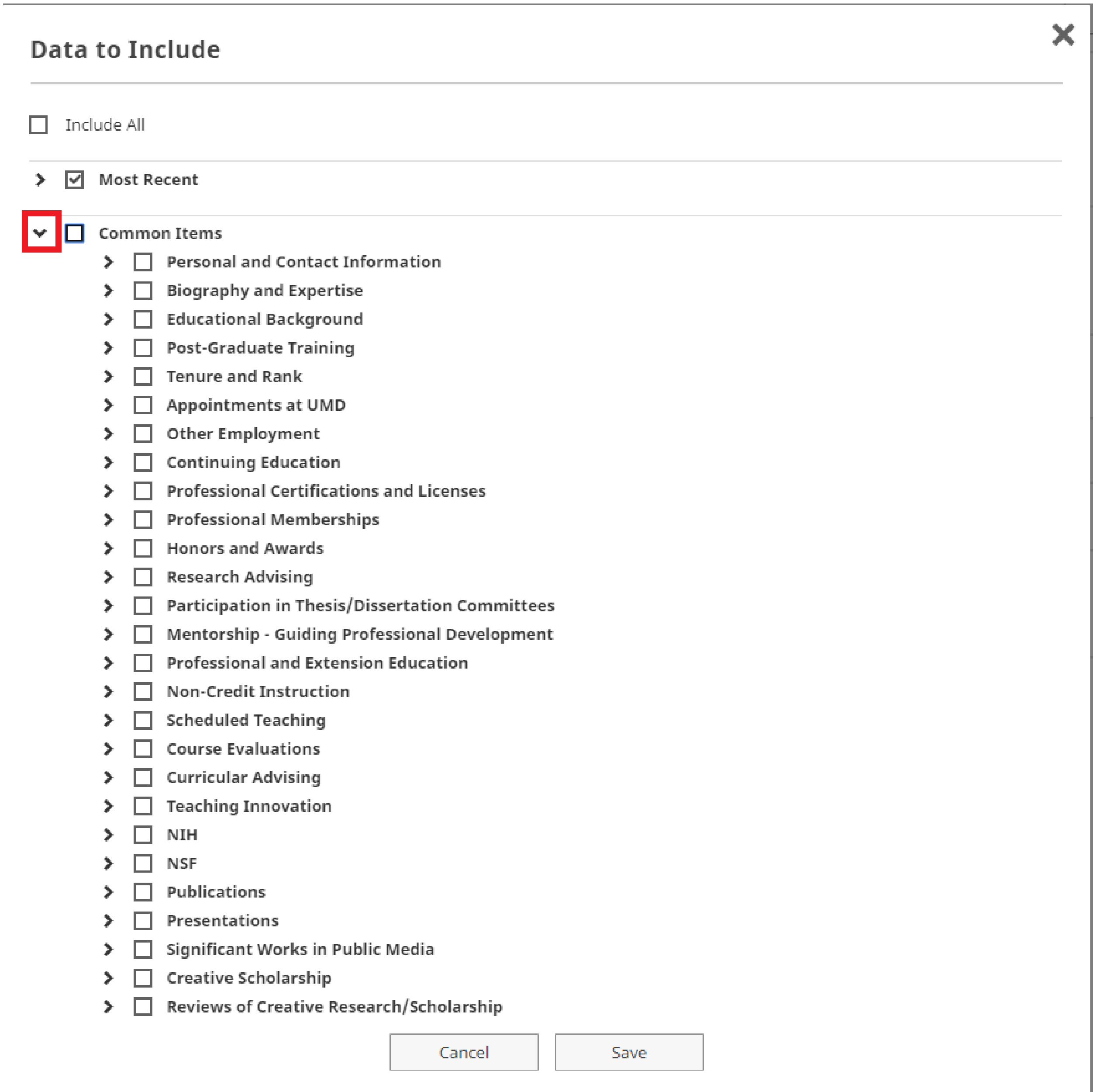
1) Includes only certain users - *Option 2: Whom to Include*
2) Includes only certain data/fields - *Option 3: Data to Include.* Select from one or more activity screens for inclusion in the report. The default is to include data from all screens.
3) Groups the output by department/center, college, tenure home (college or department) or individual - *Option 4: Grouping Method*
4) Yields data for any field that contains a keyword, or a string of keywords with Boolean operators (click on the question mark icon to view the Help document for keyword search) - *Option 5: Search Keywords.*
5) Specify the report output; by default the output is CSV. You can change to XML – *Option 6: File Format*. Additionally, you can specify if the generated report has a single file per screen, or multiple. Most often, the default CSV and Single file options are used.



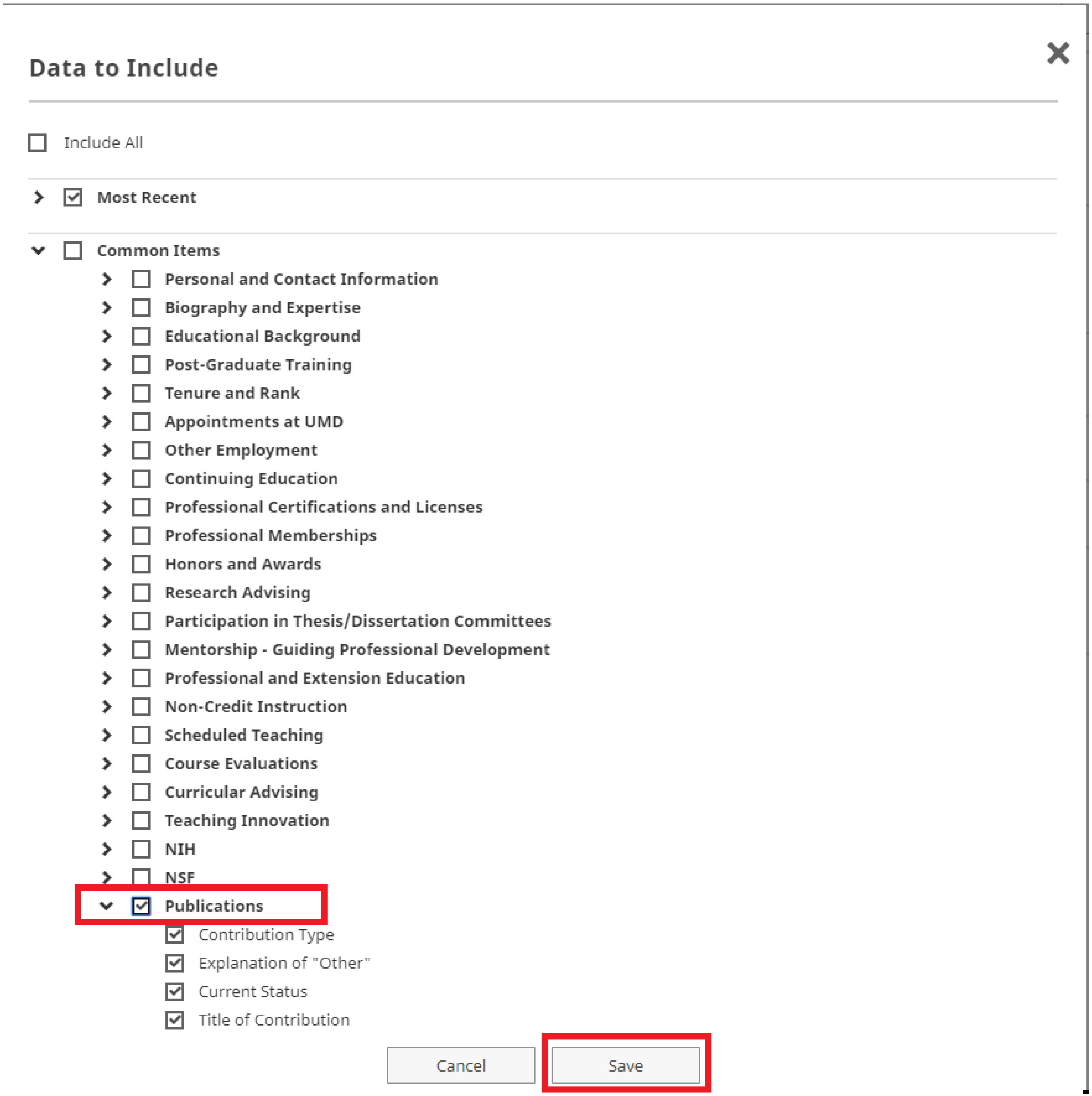
Most frequently, you will want to modify the default for option 3, Data to Include. To make changes use Change Selection to get access to the entire set of screen names.



On the Data to Include popup, uncheck 'Include All' and then open the Common Items section.



Select the screen name for the data export and Save.



Once finished setting up the reporting options, click on the Run Report to create the file. Note that the column headings are described in the Faculty Success Configuration Report spreadsheet. Navigate to the particular activity screen's tab in the file and cross reference the column heading's code with the associated label seen on the data screen in the platform.

Guide to the Configuration Report

The Configuration Report is a reference for how the Faculty Success data is currently configured. This is a system-generated Microsoft Excel workbook showing the structure of the Faculty Success instrument, with the details of the input fields for each screen on a separate worksheet.

The Configuration Report provides the following information:

On the "Overview" tab...

- **Screen codes**.
- **Summary Display logic**. This refers to the information that displays on the summary screen, or the list of existing records for a given screen.
- **Screen access settings**.
- **Force editable**. For screens with access restrictions, are users allowed to create new records?
- **Date required**. This tells you whether users must enter a significant date before saving the record.
- **Primary Key**. This is a group of fields that can be used to identify unique records and prevent the creation of duplicates when importing data.

On the screen-specific tabs...

- **Data Field Label** - what is seen on the data screen in Faculty Success
- **Field codes** - the internal code for that data field; this appears in column headings in the ad-hoc CSV data export reports
- **Display** - Text, Numeric, Dropdown, Radio Button. For drop-down displays, pay attention to the Options - this is what the acceptable values are for this field.
- **Permission**
- **Access** - some data fields are hidden; others are read-only which is indicated with a Locked access
- **Required**?
- **Default value**.
- **Minimum/maximum values**.
- **Options**. This pertains to drop-down lists of checkbox lists with predefined options.
- **Other attributes**. This includes field-specific help text.