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1. **INTRODUCTION TO LYTERATI**

Lyterati is a software application from Entigence Corporation. Lyterati is known as a Faculty ERP – or an Enterprise Resource Planning – application. ERPs are applications that allow large organizations to manage business transactions through electronic functionality. Lyterati will allow UMD to manage faculty contributions, annual reviews, and promotion and tenure. In addition, it will provide an inventory of reports for accreditation purposes. Note that “you” and “your” in this document refer to the faculty member for whom you are a designee or trainer. This guide will help you with the following objectives:

- Get familiar with Lyterati terminology
- Learn how to access the application
- Learn the components of the Home Page
- Understand what the faculty submit to Lyterati
- Understand how the CV data is loaded into Lyterati
- Understand how to view CV data after it has been loaded into Lyterati
- Understand how the CV data is organized in Lyterati
- Learn how to fix CV data if it is incorrect
- Learn how to add a designee to your Lyterati account

2. **GLOSSARY OF TERMS**

The table below describes the terms that will be used frequently during training.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lyterati</td>
<td>A comprehensive faculty information system for tracking and managing the intellectual contributions of the faculty</td>
</tr>
<tr>
<td>Home Page</td>
<td>The first page you see after completing the log in process</td>
</tr>
<tr>
<td>Left Navigation Bar</td>
<td>The list of options on the left side of the Lyterati homepage. Includes: “Update/View CV” and “Create/View AR.”</td>
</tr>
<tr>
<td>Welcome Menu</td>
<td>The list of options that appears on the top of the Lyterati homepage. Includes: Messages, Quick Links, Resources, Help, and Notifications.</td>
</tr>
<tr>
<td>Lyterati Ontology</td>
<td>The groups in which CV data is organized in Lyterati</td>
</tr>
<tr>
<td>Contribution</td>
<td>Any activity performed by the faculty in the area of Research, Teaching, and Service.</td>
</tr>
<tr>
<td>Categories</td>
<td>The top level of the Lyterati ontology consisting of Personal Information, Research, Scholarly &amp; Creative Activities, Teaching, Mentoring, and Advising, Service &amp; Outreach, Awards, Honors, and Recognition, and Other Information</td>
</tr>
<tr>
<td>Heading</td>
<td>Each category consists of many headings. Example: within Research, Scholarly &amp; Creative Activities you will find these headings: Books, Chapters, Articles in Refereed Journals, etc.</td>
</tr>
<tr>
<td>Type</td>
<td>Different genres under each heading. Example: within Books, you will find the types: Books Authored, Books Edited, Textbooks, etc.</td>
</tr>
<tr>
<td>Field</td>
<td>The details about each type of contribution, such as title, author, citation details</td>
</tr>
<tr>
<td>Intake CV Template</td>
<td>This is the template in which UMD faculty provide their CV</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Parsing Process</td>
<td>The process of taking faculty CVs in the UMD Intake CV template and loading the data into the Lyterati database</td>
</tr>
<tr>
<td>Lyterati CV</td>
<td>The faculty member’s CV produced by Lyterati using a standard UMD template</td>
</tr>
</tbody>
</table>

3. **ACCESSING LYTERATI**

*Objective: Learn how to access Lyterati and how to log into the application.*

Lyterati is available at

http://umd.lyteraticloud.com
After a redirection, you will log into Lyterati on the screen shown below.

Notes:

1. Username is your DirectoryID, which is the text to the left of the @ sign in your university email address.
2. If you are unable to log in, it will be for one of these three reasons:
   a. Your ID or password are incorrect – be sure you are entering the right ID and password
   b. You do not have a “role” assigned in Lyterati – contact your departmental representative and have them update your role in Lyterati.
   c. Your demographic information (UMD UID) does not exist in Lyterati – contact your departmental representative and have them add your information to Lyterati.
3. If you are still unable to log in, please contact the Office of Faculty Affairs.
4. **Learn the Components of the Home Page**

**Objectives:**
- Learn how to upload a photo for your Lyterati account
- Learn how to access your CV data
- Learn the location of the Lyterati user guides

Upon successful login, you will land on the Lyterati Home Page as shown below.

On this page you will be able to:
- **Upload your photo** by clicking on the image above your name. Then browse and select a file containing your picture.
- **See your CV data** by clicking on “Update/View CV” to see your CV data
- **Find Lyterati User Guides** under the “Resources” tab
- **Sign-out** by clicking on the arrow next to your name on the bar and then “Sign Out” to end the session.

**Note:** Signing out of Lyterati may continue to keep your login session active according to the rules established by UMD’s authentication system. To end your Lyterati session, always close your browser.
5. **UNDERSTAND HOW FACULTY SUBMITTED THEIR CV DATA**

**Objectives:**
1. Learn what the faculty submit to Lyterati
2. Learn what the CV Intake template looks like

Faculty members submit their CV data in the Intake CV template format. The CV is then parsed and loaded into Lyterati. See Appendix 1 to see the format of the CV submitted to Lyterati. Your CV data will be loaded into Lyterati only if you submit your CV using the Intake CV template.

6. **UNDERSTAND HOW THE INTAKE CV DATA IS PARSED AND LOADED**

**Objective:**
1. Understand how the CV data is processed

The diagram below explains the parsing and loading process.
- First the CV data is copied and pasted from the Intake CV into a series of spreadsheets for each faculty member. These spreadsheets are then loaded into the Lyterati database using an automated process. Lyterati parsers are trained on mapping information in the Intake CV to the corresponding location in Lyterati. In addition to the data from the Intake CV, automated processes pull data from UMD’s human resources system (PHR), from the student information system, and the grants management system.
- Lyterati’s Web-Based Modules are used to generate Lyterati CVs and complete the annual reporting process.
- As an end result (right box), Lyterati produces a variety of documents – such as CVs for APT purposes and the faculty annual reports.
7. **How to Create a Lyterati CV?**

**Objectives:**
1. Learn how to create your Lyterati CV
2. Learn how to save the Lyterati CV onto your desktop

To create your Lyterati CV, you have to create a local copy of the UMD Lyterati CV template. Then you can generate the CV in Word or PDF.

**7a. Create a Local Copy the UMD Standard CV Template**

7a.i Click on “Update/View CV” in the navigation bar and then on CV in the sub-menu.

7a.ii Click on the green +Add button

7a.iii Give your CV a name, such as “Your Name CV.” From the template drop down menu choose UMD CV Template.

This will automatically create a CV template with the basic blocks that are part of the UMD standard CV template.
These are the basic blocks in the standard UMD CV Template. You can click on each section to see what is contained in the standard CV format.
7b. Generate and Save Your Lyterati CV

7b.i Choose Output Format

On the top right of the page, click on Actions and then click on MSWord to see the CV in Microsoft Word format. Alternately, choose PDF format.

For MSWord and PDF on Windows:

1. Download from Lyterati
2. Optional: On Windows taskbar, click "View" and then "Print Layout"
3. Click “Save As”
4. From "Save as Type" click "Word Doc"
5. Click Save

For PDF on MAC: Your CV will be downloaded automatically.

8. UNDERSTAND THE LYTERATI ONTOLOGY

Objectives:
1. Understand the Lyterati ontology i.e. how data is organized in the application
2. Understand what information on the Lyterati CV comes from sources other than the CV
3. Understand the differences in the types of headings

The Lyterati ontology describes how CV data is organized within Lyterati. The ontology contains the four parts as shown below.

- Categories – this is the highest-level grouping
- Headings – each category has a number of headings underneath it
- Types – this is the lowest-level grouping with each heading having a number of types
- Fields- are the individual items within an entry entered in text

The categories, headings, and types appear in the same order as in the Lyterati Intake CV.
8a. Lyterati Categories

Lyterati categories are shown below. These are in the first menu when you click on “Update/View CV.”

8b. Lyterati Headings

Within each category you will find headings. The following diagrams show headings for each category.
<table>
<thead>
<tr>
<th>Research, Scholarly and Creative Activities</th>
<th>Books</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Chapters</td>
</tr>
<tr>
<td></td>
<td>Articles in Refereed Journals</td>
</tr>
<tr>
<td></td>
<td>Published Conference Proceedings</td>
</tr>
<tr>
<td></td>
<td>Conferences, Workshops and Talks</td>
</tr>
<tr>
<td></td>
<td>Professional Publications</td>
</tr>
<tr>
<td></td>
<td>Book Reviews, Notes and Other Contributions</td>
</tr>
<tr>
<td></td>
<td>Completed Creative Works</td>
</tr>
<tr>
<td></td>
<td>Significant Works in Public Media</td>
</tr>
<tr>
<td></td>
<td>Sponsored Research</td>
</tr>
<tr>
<td></td>
<td>Fellowships, Gifts and Other Funded Research</td>
</tr>
<tr>
<td></td>
<td>Submissions and Works in Progress</td>
</tr>
<tr>
<td></td>
<td>Centers for Research, Scholarship and Creative Activities</td>
</tr>
<tr>
<td></td>
<td>Patents</td>
</tr>
<tr>
<td></td>
<td>Other Research/Scholarship/Creative Activities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Teaching, Mentoring and Advising</th>
<th>Courses Taught (for CV)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Courses Taught (from SiS)</td>
</tr>
<tr>
<td></td>
<td>Teaching Innovations</td>
</tr>
<tr>
<td></td>
<td>Advising: Research or Clinical</td>
</tr>
<tr>
<td></td>
<td>Mentorship</td>
</tr>
<tr>
<td></td>
<td>Advising: Other than Research Direction</td>
</tr>
<tr>
<td></td>
<td>Professional and Extension Education</td>
</tr>
<tr>
<td></td>
<td>Other Teaching Activities</td>
</tr>
</tbody>
</table>
Note that the section “Awards and Honors” and “Other Information” do not have headings.

8c. Lyterati Types

Each heading has “types” to further categorize the heading. For example, the following are types within the heading “Books”:

1. Books Authored
2. Books Edited
3. Books Translated (as translator)
4. Textbooks
5. Major Reference Works
6. Exhibition Catalogs
7. Other

A comprehensive list of the different “types” is listed for each heading in the CV Intake template (Appendix 1).
Note the following clarifications about headings and types that may be helpful to you:

- An article that has been published in a peer-reviewed journal falls under "Articles in Refereed Journals."
- An article that appears in a trade magazine or other publication that is aimed at practitioners belongs under the heading "Professional Publications."
- The heading "Significant Works in Public Media" is generally intended for the School of Journalism and is used to capture the contributions of journalists who have written in public media.
- "Media Contributions" are for faculty in different departments who have any media appearances.
- "Sponsored Research" (processed through ORA) includes grants and contracts that demand highly structured deliverables from the faculty in exchange for a financial award.
- "Fellowships, Gifts and Other Funded Research" (not processed through ORA) generally provide more flexibility in how faculty can utilize the awarded money.
- Entries related to faculty members who direct dissertations are recorded in "Advising: Research or Clinical." Specific information regarding a student, their dissertation, and placement after graduation is recorded here. In contrast, the heading "Advising: Other than Research Direction" records mass advising done; for example, course advising for undergraduate students falls under this heading. In such cases the type of advising and the number of students advised during a semester may be recorded here.
- "External Service and Consulting" refers to any consulting or service of significant duration provided to an outside entity. This may be paid or pro bono. These activities tend to be more extensive than a lecture or a presentation and typically involve specific tasks that are performed.
- "Non-Research Presentations" include presentations given by faculty on topics unrelated to their research activities.

9. **What Information Does Lyterati Include Other Than CV Data?**

**Objective:**

1. Learn about the UMD systems from which Lyterati imports data.

In addition to the CV data, Lyterati periodically takes data from several UMD systems:

- Lyterati takes basic personal information (like name, college, data) from the UMD human resource system called PHR.
• "Courses Taught (SIS)" pulls data from the student information system and student evaluations provides more detailed information on each section of a given course
• Grants information - proposals, all awards, active awards, and expenditures - come from both the CV data submitted by faculty as well as the UMD grants management system

10. **HOW DO I FIX THE LYTERATI CV DATA?**

    **Objectives:**
    1. Understand the common mistakes that can occur in the parsing process
    2. Learn how to locate and fix incorrect data in Lyterati

The parsing process involves interpretation and is not expected to be 100% accurate. Faculty may not follow the Intake CV template or the parsers may make a mistake in copying and pasting information or in interpreting the data. As a faculty's designee, you may be asked to fix these errors.

Here's a guide to follow:

1. **What should I do if I notice a typographical error in my Lyterati CV?**
   - Note the heading under which the error occurs
   - Click "Update/View CV" and choose the appropriate category and heading
   - Search for the incorrect entry and click the pencil on the right to edit
   - Follow directions in this section to edit a contribution and click "Save"
   - Regenerate the CV

2. **What should I do if I notice that a row of data is missing from my CV?**
   - Note the heading where the data should exist
   - Click "Update/View CV" and choose the appropriate category and heading
   - Follow directions in this section to add a contribution
   - Click "Save"

3. **What should I do if I notice that a row of data is in the wrong location?**
   - Click "Update/View CV" and choose the appropriate category and heading
   - Follow directions in this section to move or change type for a contribution

4. **Can I use my own categories/headings?**
   The CV that you submit must follow the template of the UMD Intake CV. The Lyterati categories and headings have been configured from the Intake CV. Contact the Office of Faculty Affairs to request new categories and headings.
5. **There are too many errors in my Lyterati CV? What should I do?**
   If you notice that there are more than 15 errors in your CV, please contact the Office of Faculty Affairs.

6. **How do I report a problem?**
   If you notice a systematic error or a problem with any page, you can report the problem, a feature at the bottom of every page, as shown below:
This will then take you to the page below where you can fill out the report a problem page.

10a. Edit a Contribution

10a.i: If you want to update an entry in “Articles in Refereed Journals”, click on “Research, Scholarly, and Creative Activities” and then on “Articles in Refereed Journals.”

This will take you to a list page that shows all your articles that have been published in refereed journals.
The list appears in a table format, thereby showing you the most important information about each article.

10a.ii To see all the details for a specific article, click on the pencil icon to the right of each row. This will take you to the details page for the article.
## Articles in Refereed Journals

<table>
<thead>
<tr>
<th>Title*</th>
<th>A Framework for the Comparative Study of Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication Name*</td>
<td>Comparative Evolutionary Psychology</td>
</tr>
<tr>
<td>Authors</td>
<td>Juan Uriagereka with J. Reggia and J. Wilkinson</td>
</tr>
<tr>
<td>Article Type</td>
<td>--------</td>
</tr>
<tr>
<td>Contribution Year*</td>
<td>2011</td>
</tr>
<tr>
<td>Contribution Month</td>
<td>--------</td>
</tr>
<tr>
<td>Additional Details</td>
<td>2011, J. York and T. K. Scholesford (eds.), a dedicated number of Evolutionary Psychology.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter the URL where this article is located</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter comments that you wish for your supervisor to see during the FAR process</td>
</tr>
<tr>
<td>Tags</td>
<td>Enter the words that best describe the themes of this article or strategic plan items that this article fits</td>
</tr>
</tbody>
</table>
Note these important attributes about the detail page:

- All fields marked with an asterisk are required. You will not be able to save your changes unless values are entered or selected for the required fields.
- “Additional Details” contains citation information such as editors, publishers, pages, volume, no, etc.

10a.iii Edit the information on this page as you need and then click on the “Save” button to save your changes.

10b. Add a New Contribution

10b.i Find the appropriate heading where the contribution should be. In this example, add a new article in refereed journal.

**If you record your citations in a Word document:** Copy the citation from the Word document. Paste into the “Additional Details” box on the Article Detail page and follow instructions below. Use the example shown in the diagram below.

**If you do not record your citations in Word:** Enter data in the required fields and the remaining data in the “Additional Details” box. Or enter the citation in the “Additional Details” box and follow the instruction in section d. below. Required fields are marked with an asterisk.

---

**Articles in Refereed Journals**

<table>
<thead>
<tr>
<th>Title*</th>
<th>Enter title of contribution, e.g., article title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication Name*</td>
<td>Enter the name of the publication where article has appeared, e.g., Journal Name</td>
</tr>
<tr>
<td>Authors</td>
<td>Enter the list of authors as they appear in the citation. Enter ^ after primary authors, * after corresponding</td>
</tr>
<tr>
<td>Article Type</td>
<td></td>
</tr>
<tr>
<td>Contribution Year*</td>
<td></td>
</tr>
<tr>
<td>Contribution Month</td>
<td></td>
</tr>
</tbody>
</table>

**Additional Details**

1. Highlight

2. Drag and Drop into the Authors box.
Drag and drop required fields from Additional Details: Select the Title and drag and drop it in the Title box, select the Authors and drag and drop it into the Authors box, select the Journal Name and drag and drop it into the Publication Name box. Be sure to review the “Additional Details” box after you complete dragging and dropping. Remove any extra punctuation like commas remaining in this box.

10c. Upload a Document

You may often want to upload a document associated with a contribution. For example you may have a PDF of a working paper.

To upload a document with this contribution, click on “Actions” on the top right and then on documents to browse and upload one or more documents.
10d. Change the Contribution Type

Each contribution heading has a number of “types” associated with it. For example in “Conferences, Workshops and Talks,” you will find these types in the field called “Contribution Type” in the detail page:

On the contribution list page you will also find the types above the conferences in the “Change Type to” box:

To update the contribution type for a number of rows, click on the checkboxes next to the rows and then click on “Change Type to” and select the new type.
10e. Move Contributions to Another Heading

This is illustrated through the following example. If there is a contribution under the “Submissions and Work in Progress” heading and it has now been published as a “Published Conference Proceeding,” follow the steps below to move this contribution to the new heading:

10e.i: Select the contribution you want to move. Click on the check box to the left of the row.

10e.ii: Now click on “Move Submissions and Works in Progress to” (on the line with the green add button).

10e.iii: Select the heading “Conferences, Workshops and Talks” from the drop down list in the move box.
10e.iv Warning Pop-up

The application will warn you that some data may be lost in this move if there isn’t a one-to-one correspondence between the fields you are moving. Typically, this means that the contribution type in the “Submissions and Works in Progress” will not move. You will need to set the contribution type that is appropriate for “Conferences, Workshops and Talks.” Click on “Move” in the warning pop-up.

10e.v Set Attributes to Complete the Move

The application will place you on the “Conferences, Workshops and Talks” list page. The row you moved will be placed in the appropriate chronological order. Click on the pencil icon next to the row and set the contribution type.

11. What if I want a New Designee?

To request a new or additional designee, contact the Office of Faculty Affairs to make the necessary changes in Lyterati.