



UNIVERSITY OF
MARYLAND

THE OFFICE OF FACULTY AFFAIRS

Faculty Success:

Faculty Guide

Welcome to Faculty Success!

Benefits to Users

Logging In to Faculty Success

Faculty Success Overview

Data Brought In From Other Sources

Activity Screens: The Basics

Adding an Item

Date Handling in Faculty Success

Curating/Editing an Item

Removing an Item

Duplicating an Item

Sending Bulk Import Request for the Activities

Importing Publications

Overview

Importing is Just the First Step...

Adding/Updating Collaborators on an Activity

Author/Editor Annotations with Publications

Faculty Annual Activity Report Generation

Troubleshooting Issues with Reports

Timesavers

Keyword Search

Author Reordering

Author Deletion

PasteBoard

Creating Custom CVs

Exporting Activity Data

Guide to the Configuration Report

On the "Overview" tab...

On the screen-specific tabs...

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.

The screenshot shows the top navigation bar of the University of Maryland website. The header is red with white text. On the left, it says "UNIVERSITY OF MARYLAND". On the right, there are icons for "COLLEGES & SCHOOLS", "NEWS", "EVENTS", and a search icon. Below the header is the University of Maryland logo, which includes a red and white checkered circle and the text "UNIVERSITY OF MARYLAND" and "THE OFFICE OF FACULTY AFFAIRS". To the right of the logo is a search bar with a "Search" button. Below the logo and search bar is a navigation menu with the following items: "Login to Digital Measures" (highlighted with a red box), "Home", "Important News", "Help & Resources" (with a dropdown arrow), "Administrator" (with a dropdown arrow), "Proxy Access", and "Contact Us".

Faculty Activities Data: Telling Y(Our) Story

Digital Measures by **Watermark** (formerly Activity Insight) is our faculty activities system. This system enables individual faculty members and the University as a whole to promote and report accomplishments and activities. We initially launched this new tool over the 2019 calendar year with tenured/tenure-track faculty members, and they used it for annual reporting this past spring. In this next phase, all paid faculty are invited to use Digital Measures to report their accomplishments and activities - to tell their story.

2020 Annual Activity Reporting

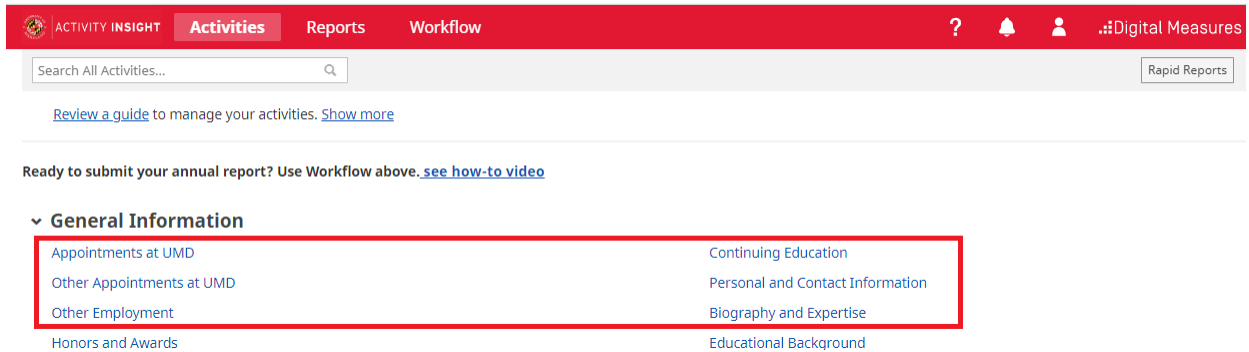
Submission period: January 19 - March 12, 2021 [...]

Explaining Faculty Work/Activity

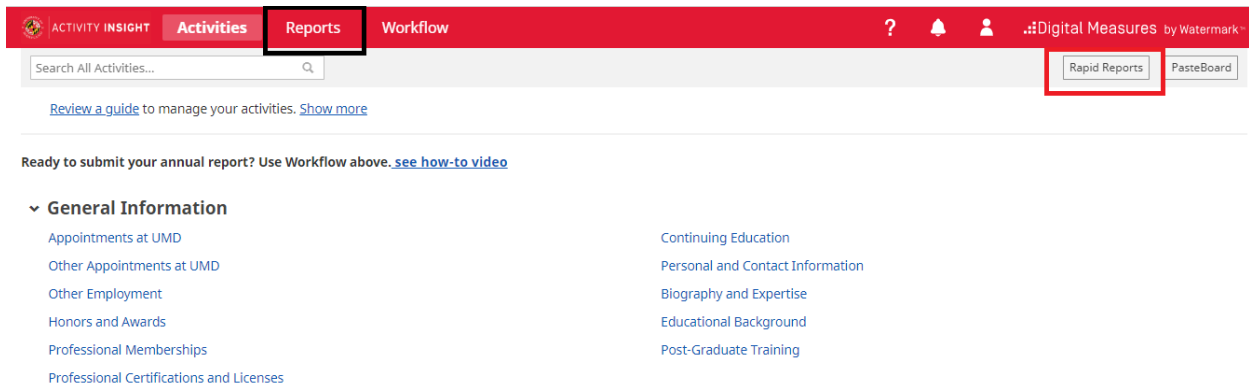
Resources for documenting the impact of the pandemic [...]

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.

ACTIVITY INSIGHT **Activities** Reports ? Digital Measures by Watermark

Search All Activities...

[Review a guide](#) to manage your activities. [Show more](#)

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:

General Information

[Appointments at UMD \(Imported Data\)](#)

[Other Appointments at UMD](#)

[Other Employment](#)

[Honors and Awards](#)

[Professional Memberships](#)

[Professional Certifications and Licenses](#)

[Continuing Education](#)

[Personal and Contact Information \(Imported Data\)](#)

[Biography and Expertise](#)

[Educational Background](#)

[Post-Graduate Training](#)

Teaching, Extension and Advising

[Scheduled Teaching \(Imported Data\)](#)

[Course Evaluations \(Imported Data\)](#)

[Research Advising](#)

[Participation in Thesis/Dissertation Committees \(Imported Data\)](#)

[Teaching Innovation](#)

[Non-Credit Instruction](#)

[Professional and Extension Education](#)

[Curricular Advising](#)

Research, Scholarly, Creative and/or Professional Activities

[Publications](#)

[Presentations](#)

[Significant Works in Public Media](#)

[Creative Scholarship](#)

[Reviews of Creative Research/Scholarship](#)

[Professional and Extension Publications](#)

[Centers for Research and Creative Scholarship](#)

[Patents and Inventions](#)

[Biographical Sketch - NIH | NSF](#)

Sponsored Research

[ORA-Managed Awards \(Imported Data\)](#)

[Other Awards and Gifts](#)

[ORA-Managed Proposals \(Imported Data\)](#)

[Other Proposals](#)

[Active ORA-Managed Awards](#)

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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? ..Digital Measures by Watermark™

Search Honors and Awards...

[← Honors and Awards](#)

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.

Item	<input type="checkbox"/>
Presidential Award, Supercomputing '19, (March, 2019)	<input type="checkbox"/>
Presidential Award, Supercomputing '95, (March, 1995)	<input type="checkbox"/>
Lifetime Fellow, Sample Organization, (1992)	<input type="checkbox"/>

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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? ..Digital Measures by Watermark™

Search Honors and Awards...

[← Honors and Awards](#)

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.

Item	<input type="checkbox"/>
Presidential Award, Supercomputing '19, (March, 2019)	<input type="checkbox"/>
Presidential Award, Supercomputing '95, (March, 1995)	<input type="checkbox"/>
Lifetime Fellow, Sample Organization, (1992)	<input type="checkbox"/>

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.

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

B I U x² x₂ ↺ ↻ ↗

Date
Month Year*
2018

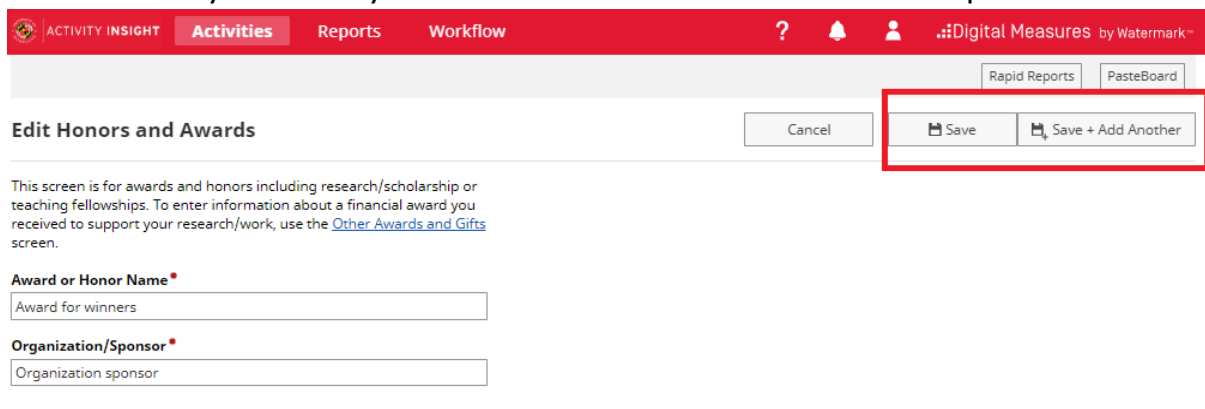
Supporting Documentation (optional) (1)

Use this if you want to attach PDFs, videos or other files related to this activity.

1st Supporting Document		Actions
Document	File Description	
<div style="border: 1px dashed #ccc; padding: 10px; text-align: center;">Drop file here or select to upload</div>	<input type="text"/>	

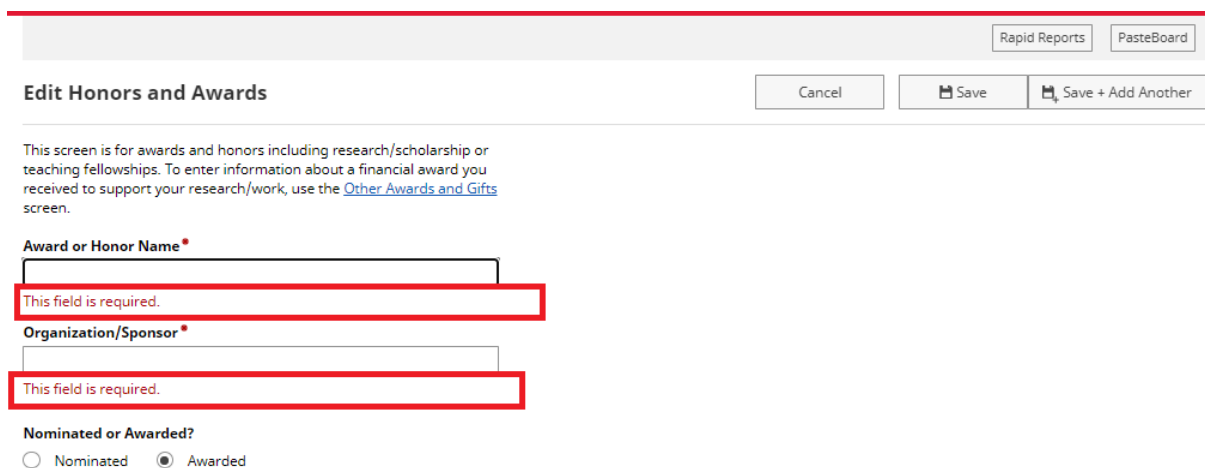
+ Add Row

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



The screenshot shows the top navigation bar with 'ACTIVITY INSIGHT' and 'Activities' selected. Below the navigation bar, there are buttons for 'Rapid Reports' and 'PasteBoard'. The main heading is 'Edit Honors and Awards'. Below the heading, there are three buttons: 'Cancel', 'Save', and 'Save + Add Another'. The 'Save' and 'Save + Add Another' buttons are highlighted with a red box. Below the buttons, there is a paragraph of text: '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.' Below the text, there are two input fields: 'Award or Honor Name*' with the value 'Award for winners' and 'Organization/Sponsor*' with the value 'Organization sponsor'.

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.



The screenshot shows the same 'Edit Honors and Awards' form as above. The 'Save' and 'Save + Add Another' buttons are now disabled. Below the 'Award or Honor Name*' input field, there is a red box containing the error message 'This field is required.'. Below the 'Organization/Sponsor*' input field, there is another red box containing the error message 'This field is required.'. Below the input fields, there is a section for 'Nominated or Awarded?' with two radio buttons: 'Nominated' and 'Awarded', where 'Awarded' is selected.

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.

[Review a guide](#) to manage your activities. [Show more](#)

Ready to submit your annual report? Use Workflow above. [see how-to video](#)

▼ **General Information**

- Appointments at UMD (Imported Data)
- Other Appointments at UMD
- Other Employment
- Honors and Awards
- Professional Memberships
- Professional Certifications and Licenses
- Continuing Education
- Personal and Contact Information (Imported Data)
- Biography and Expertise
- Educational Background
- Post-Graduate Training

▼ **Teaching, Extension and Advising**

- Scheduled Teaching (Imported Data)
- Course Evaluations (Imported Data)
- Research Advising**
- Participation in Thesis/Dissertation Committees (Imported Data)
- Teaching Innovation
- Non-Credit Instruction
- Professional and Extension Education
- Curricular Advising

▼ **Research, Scholarly, Creative and/or Professional Activities**

- Publications
- Presentations
- Significant Works in Public Media
- Creative Scholarship
- Reviews of Creative Research/Scholarship
- Professional and Extension Publications
- Centers for Research and Creative Scholarship
- Patents and Inventions
- Biographical Sketch - NIH | NSF

▼ **Sponsored Research**

- ORA-Managed Awards (Imported Data)
- Other Awards and Gifts
- ORA-Managed Proposals (Imported Data)
- Other Proposals
- Active ORA-Managed Awards

▼ **Cross-cutting and Other Contributions**

- Contributions (Draft)

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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? ..Digital Measures by Watermark

Search Research Advising...

< Research Advising

This screen is used to list specific students or post-docs you have previously or are currently advising or mentoring in their research. It documents your ongoing involvement with students in advising, mentoring and research efforts.

Note that involvement in thesis/dissertation committees for successfully completed research is automatically recorded on the [Participation in Thesis/Dissertation Committees](#) screen, with data provided by the Graduate School on a per term basis. Committee involvement is added at the close of the student's graduating term.

Item	<input type="checkbox"/>
Doctoral, Bob (January 2017 - February 2019)	<input type="checkbox"/>
Master's, Lilly (February 2016 - June 2017)	<input type="checkbox"/>

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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? Digital Measures by Watermark™

Rapid Reports PasteBoard

Edit Research Advising Cancel Save Save + Add Another

First Name

Last Name

Institution if not UMD

Role

Co-Advisor?
 Yes No

Degree Level ⓘ

Program

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.

- At least one date is required. If your activity is ongoing, only enter the Start Mo/Yr. If your activity was only one day, only enter the End Mo/Yr.

Date Started

Month **Year**

Date Completed

Month **Year**

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).

Edit Research Advising

Co-Advisor?
 Yes No

Degree Level

Program

Degree Level

Program

Placement Institution/Organization

For terminal master's degrees (e.g. MBA or MFA) please select Master'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.

▼ 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
<div style="border: 1px dashed gray; padding: 5px; text-align: center;"> Drop file here or select to upload </div>	

+ Add Row

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.

▼ 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
<div style="border: 1px dashed gray; padding: 5px; text-align: center;"> Drop file here or select to upload </div>	

+ Add Row

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.*

ACTIVITY INSIGHT **Activities** Reports Workflow ? Digital Measures by Watermark

Rapid Reports PasteBoard

Edit Research Advising Cancel **Save** Save + Add Another

First Name

Last Name

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.

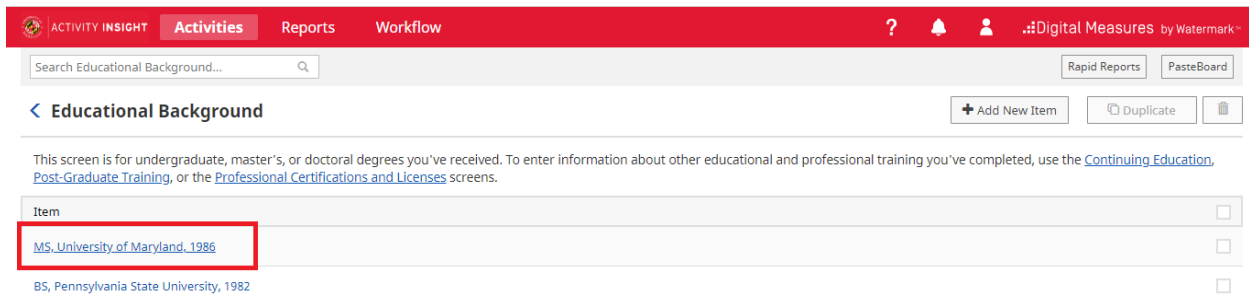
Data populated from the PHR, SIS, CourseEvalUM, Kuali Research and Graduate School campus integrations cannot be edited on the data screen. Check below to see how to get changes made, if needed:

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)

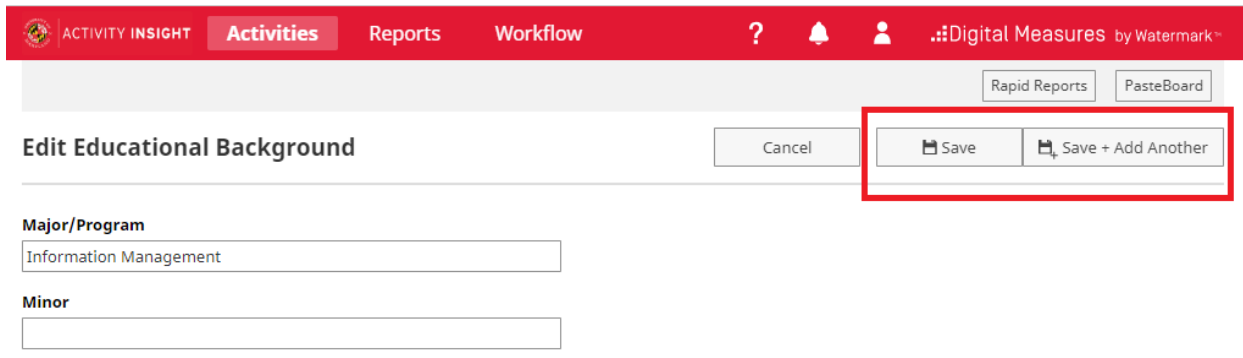
Other screens may have data that was pulled from the Lyterati system. Every effort was made to bring this data in cleanly and to populate the correct set

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.

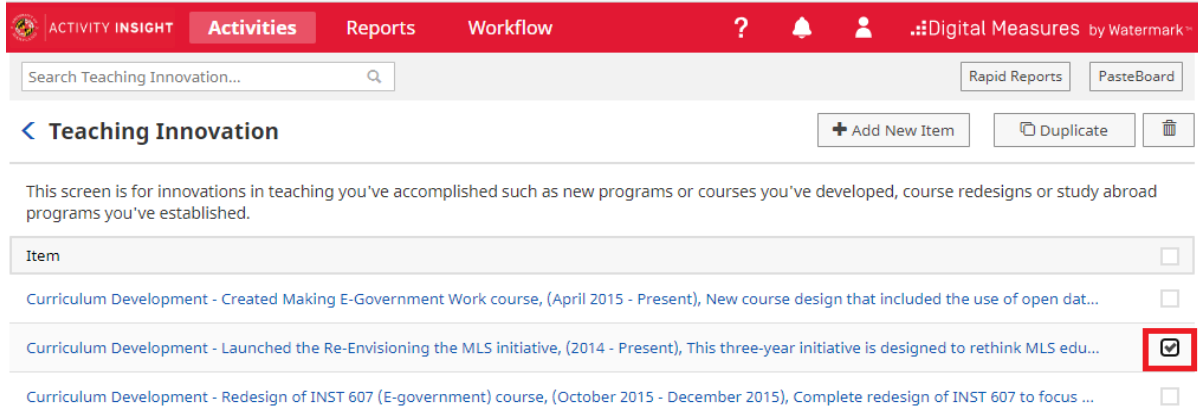


Make any necessary updates to the data entry screen. Remember that all required fields (marked with an asterisk) must be filled in. Once finished click "Save" in the upper right.

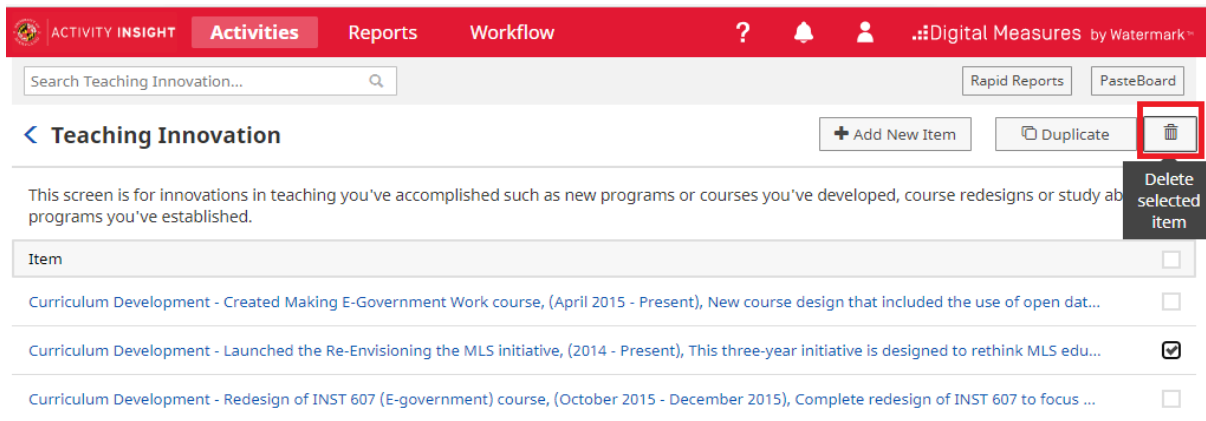


Removing an Item

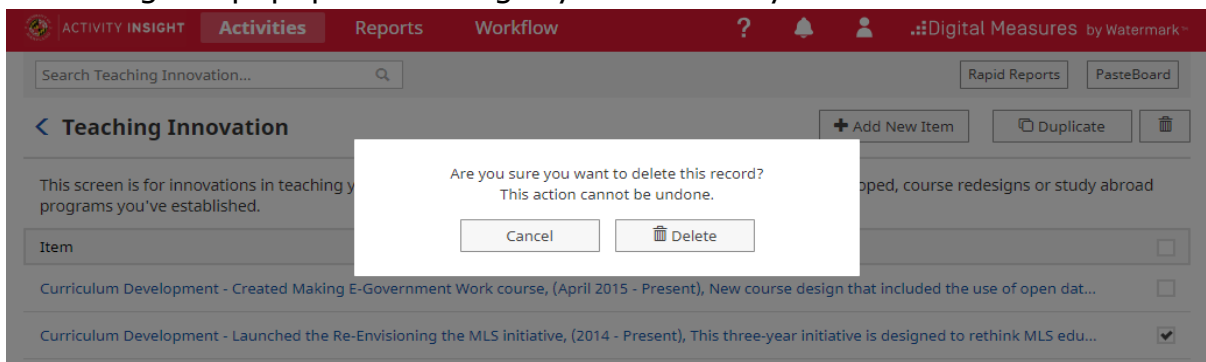
There may be times when you need to delete activities that have been duplicated or added in error. To do this, simply go to the summary screen where the record is located and select the record you want to delete by clicking the checkbox for that record:



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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? [bell icon] [user icon] Digital Measures by Watermark™

Search Teaching Innovation... [magnifying glass icon] Rapid Reports PasteBoard

< **Teaching Innovation** + Add New Item Duplicate [trash icon]

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	<input type="checkbox"/>
Curriculum Development - Created Making E-Government Work course, (April 2015 - Present), New course design that included the use of open dat...	<input type="checkbox"/>
Curriculum Development - Redesign of INST 607 (E-government) course, (October 2015 - December 2015), Complete redesign of INST 607 to focus ...	<input type="checkbox"/>

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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? [bell icon] [user icon] Digital Measures by Watermark™

Search Teaching Innovation... [magnifying glass icon] Rapid Reports PasteBoard

< **Teaching Innovation** + Add New Item Duplicate [trash icon]

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	<input type="checkbox"/>
Curriculum Development - Created Making E-Government Work course, (April 2015 - Present), New course design that included the use of open dat...	<input checked="" type="checkbox"/>
Curriculum Development - Redesign of INST 607 (E-government) course, (October 2015 - December 2015), Complete redesign of INST 607 to focus ...	<input type="checkbox"/>

Then click Duplicate in the upper right.

ACTIVITY INSIGHT **Activities** Reports Workflow ? Digital Measures by Watermark™

Search Teaching Innovation...

< Teaching Innovation

Duplicate selected item

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	<input type="checkbox"/>
Curriculum Development - Created Making E-Government Work course, (April 2015 - Present), New course design that included the use of open dat...	<input checked="" type="checkbox"/>
Curriculum Development - Redesign of INST 607 (E-government) course, (October 2015 - December 2015), Complete redesign of INST 607 to focus ...	<input type="checkbox"/>

Now you can update information for your new record.

ACTIVITY INSIGHT **Activities** Reports Workflow ? Digital Measures by Watermark™

Edit Teaching Innovation

Activity Type*

Curriculum Development

Curriculum Development

Education Abroad Established

Instructional Workshops and Seminars Established

New Course

New Degree Program

Software, Applications, Online Education, etc.

Teaching Module

Other

online during Summer 2015.

* Note: For activities started, but not completed, specify the start date only.

Start Date

Month **Year***

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

ACTIVITY INSIGHT **Activities** Reports Workflow ? Digital Measures by Watermark™

Rapid Reports PasteBoard

Edit Teaching Innovation Cancel Save Save + Add Another

Activity Type*
Teaching Module

Activity Name*
Sample Activity

Additional Details

B I U x² x₂ ↺ ↻ ↶

Test Description

• Note: For activities started, but not completed, specify the start date only.

Start Date

Month April **Year*** 2018

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

Search Teaching Innovation... Rapid Reports PasteBoard

< Teaching Innovation + Add New Item Duplicate

This screen is for innovations in teaching you've accomplished such as new programs or courses you've developed, course redesigns or study abroad programs you've established.

Item	<input type="checkbox"/>
Teaching Module - Sample Activity, (April 2018 - Present), Test Description	<input type="checkbox"/>
Curriculum Development - Created Making E-Government Work course, (April 2015 - Present), New course design that included the use of open dat...	<input type="checkbox"/>
Curriculum Development - Redesign of INST 607 (E-government) course, (October 2015 - December 2015), Complete redesign of INST 607 to focus ...	<input type="checkbox"/>

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.

ACTIVITY INSIGHT **Activities** Reports Workflow ? Digital Measures by Watermark™

< **Import Publications**

Your publications may exist in other systems—and we want to make adding them easy. Import your citations using one of the options below, then follow the prompts to address duplicates, match collaborators, and perform a final review to complete the process.

Import from a BibTeX file ⓘ

Import publications from other software or databases such as:

- EndNote
- Mendeley
- HeinOnline
- Google Scholar
- RefWorks
- Zotero

Choose File...

Import from a Third Party ⓘ

Select a service:

Web of Science Crossref PubMed

Search criteria:

Author

Publication Date to

[Add search criteria](#)

Search Crossref >

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

UNIVERSITY OF MARYLAND Activities Reports Workflow ?

Search All Activities... 🔍

> Teaching, Extension and Advising

▼ Research, Scholarly, Creative and/or Professional Activities

1 Publications	Centers for Research and Creative Scholarship
2 Presentations	6 Patents
3 Significant Works in Public Media	6 Inventions
4 Creative Scholarship	Entrepreneurial Technology Transfer
5 Reviews of Creative Research/Scholarship	Biographical Sketch - NIH NSF
Professional and Extension Publications	

▼ Sponsored Research

7 ORA-Managed Awards (Imported Data)	7 ORA-Managed Proposals (Imported Data)
7 Other Awards and Gifts	7 Other Proposals

> Cross-cutting and Other Contributions

▼ Service and Outreach

University Service	Mentorship - Guiding Professional Development
Professional Service	4 Media Contributions and Outreach Presentations
Editorships, Editorial Boards, and Reviewing Activities	4 Consulting
4 External, Community, and Other Service	

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.

Authors/Collaborators
Please select a person from the drop-down list and/or enter their name in the input fields.

1st Author/Collaborator

People at University of Maryland
Faculty, Sample: sample.faculty

First Name

Middle Name/Initial

Last Name

Select the number of author/collaborator rows to add: **+Add**

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:

Authors/Collaborators (2)
Please select a person from the drop-down list and/or enter their name in the input fields.

1st Author/Collaborator

People at University of Maryland
Faculty, Sample: sample.faculty

First Name

Middle Name/Initial

Last Name

2nd Author/Collaborator

People at University of Maryland

A'Hearn, Michael F: formerfaculty
Abadi, Daniel: abadi
Abadir, Miranda: mabadir
Abasi, Ali: aabasi
Abazajian, Kevork N: formerfaculty
Abbasi, Hossein: habbasi
Abbott, Melanie: mabbott
Abd-Almageed, Wael: formerfaculty
Abdul, Yunus: yabdul
Abebe, Elizabeth: abebe
Abebe, Israel G: formerfaculty

First Name

Middle Name/Initial

Last Name

+ Add Row

OR

2. If the other member is not 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.

The screenshot shows a form titled "Authors/Collaborators (2)". Below the title is a instruction: "Please select a person from the drop-down list and/or enter their name in the input fields." There are two rows of input fields. The first row is labeled "1st Author/Collaborator" and contains a dropdown menu for "People at University of Maryland" (with "Faculty, Sample: sample.faculty" selected), and three text input fields for "First Name" (containing "Sample"), "Middle Name/Initial", and "Last Name" (containing "Faculty"). The second row is labeled "2nd Author/Collaborator" and contains a similar dropdown menu and three empty text input fields for "First Name", "Middle Name/Initial", and "Last Name". A red box highlights the second row. At the bottom of the form is a "+ Add Row" button.

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:

ACTIVITY INSIGHT | Activities | **Reports** | Workflow | ? | [Notification] | [User] | Digital Measures by Watermark

Reports

[+ Create a New Report](#)

Select the report you would like to view or edit, or select to create a new report.

Name	Created By	Actions
Annual Activity Report	Digital Measures	[Lock]
NIH Biographical Sketch	Digital Measures	[Lock]
NSF Biographical Sketch	Digital Measures	[Lock]
UMD Vita	Digital Measures	[Lock]
Work In Progress Draft Report	Digital Measures	[Lock]

ACTIVITY INSIGHT | Activities | **Reports** | Workflow | ? | [Notification] | [User] | Digital Measures by Watermark

< Run Annual Activity Report

[Download this report's template](#) [Run Report](#)

- Date Range**

Start Date: January 01 2020

End Date: December 31 2020
- File Format**

File Format: Microsoft Word (.doc)

Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size: Letter

2) Using Rapid Reports:

ACTIVITY INSIGHT | Activities | Reports | Workflow | ? | [Notification] | [User] | Digital Measures by Watermark

Search All Activities... [Search]

[Review a guide](#) to manage your activities. [Show more](#)

Ready to submit your annual report? Use Workflow at

Rapid Reports [Close]

Select a report template, date range and file format, then run the report.

Report: Annual Activity Report

Start Date: Jan 01 2020

End Date: Dec 31 2020

File Format: Microsoft Word (.doc)

Note: Changes to Microsoft Word reports do not change data in the system.

[Cancel](#) [Run Report](#)

[Rapid Reports] [PasteBoard]

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.

▼ **Authors/Collaborators (3)**

Please select a person from the drop-down list and/or enter their name in the input fields.

1st Author/Collaborator Actions ▼

People at University of Maryland	First Name	Middle Name/Initial
<div style="border: 1px solid black; padding: 2px;"> ⋮ Faculty, Sample: sample.faculty </div>	Sample	
Last Name		
Faculty		

2nd Author/Collaborator Actions ▼

People at University of Maryland	First Name	Middle Name/Initial
<div style="border: 1px solid red; padding: 2px;"> ⋮ </div>		
Last Name		

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.

▼ **Authors/Collaborators (3)**

Please select a person from the drop-down list and/or enter their name in the input fields.

1st Author/Collaborator Actions ▼

People at University of Maryland	First Name	Middle Name/Initial	Last Name
<div style="border: 1px solid gray; padding: 2px;"> ⋮ Faculty, Sample: sample.faculty </div>	Sample		Faculty

2nd Author/Collaborator

Actions ▼

- Add Row Above
- Add Row Below
- Move Row
- Delete Row

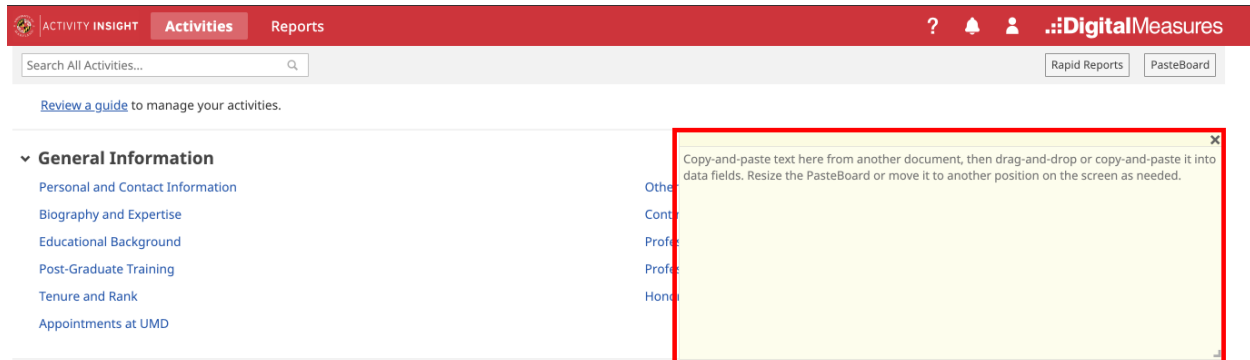
People at University of Maryland	First Name	Middle Name/Initial	Last Name
<div style="border: 1px solid gray; padding: 2px;"> ⋮ </div>			

3rd Author/Collaborator

People at University of Maryland	First Name	Middle Name/Initial	Last Name
<div style="border: 1px solid gray; padding: 2px;"> ⋮ </div>			

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.

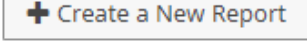
Creating Custom CVs

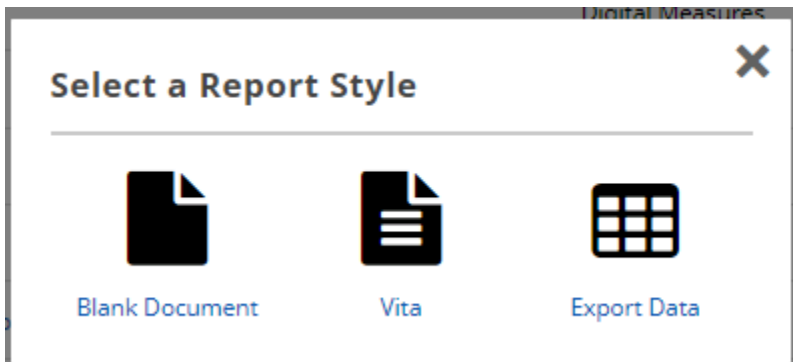
Faculty have the ability to generate a CV in the standard UMD Vita format, known as a “UMD Vita” in Faculty Success, through either the Reports or Rapid Reports features. [To better understand how the UMD Vita report in Digital Measures currently supports the [University CV template](#), refer to the [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.



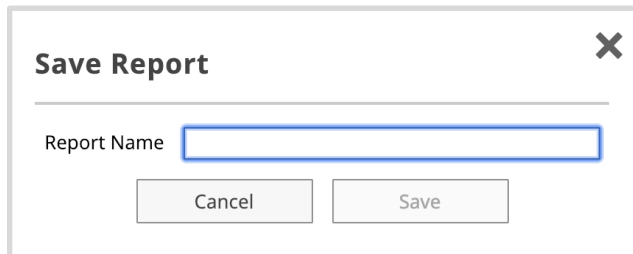
2. Click on the  button in the upper right area of the Reports screen.
3. Choose the **Vita** option when selecting the report style to begin with the default CV template. Selecting this option is the easiest and fastest way to customize your CV.



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.

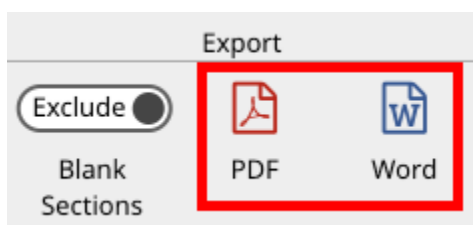
4. Your CV will be auto-populated on the next screen based on your data in Faculty Success and the default CV template.
5. There are a variety of ways to customize your CV, including but not limited to those outlined below. Faculty Success has published content on how to customize your CV, including 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.



A dialog box titled "Save Report" with a close button (X) in the top right corner. Below the title is a horizontal line. Underneath, the text "Report Name" is followed by an empty text input field. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Save" on the right.

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 do 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.

The screenshot shows the 'Create a New Report' interface with the following settings:

- 1 Date Range**: All Dates. Start Date: January 01 2017. End Date: December 31 2017.
- 2 Whom to Include**: Users Selected by: All [Change Selection](#). Include These Accounts: Enabled Only.
- 3 Data to Include**: Fields Selected from: All [Change Selection](#).
- 4 Grouping Method**: Group by: None.
- 5 Search Keywords**: Search Keywords: [Empty text box].
- 6 File Format**: File Format: Comma-Separated Values (.csv). Files per Screen: Single.

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.

ACTIVITY INSIGHT Activities **Reports** ? ..:Digital Measures by Watermark™

[← Create a New Report](#) [Save](#) [Run Report](#)

1 **Date Range** All Dates

Start Date January 01 2019

End Date December 31 2019

2 **Whom to Include** Users Selected by **All**
Change Selection

Include These Accounts Enabled Only

3 **Data to Include** Fields Selected from **All**
Change Selection

4 **Grouping Method** Group by None

5 **Search Keywords** Search Keywords

6 **File Format** File Format Comma-Separated Values (.csv)

Files per Screen Single

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

Data to Include ✕

Include All

> Most Recent

Common Items

- > Personal and Contact Information
- > Biography and Expertise
- > Educational Background
- > Post-Graduate Training
- > Tenure and Rank
- > Appointments at UMD
- > Other Employment
- > Continuing Education
- > Professional Certifications and Licenses
- > Professional Memberships
- > Honors and Awards
- > Research Advising
- > Participation in Thesis/Dissertation Committees
- > Mentorship - Guiding Professional Development
- > Professional and Extension Education
- > Non-Credit Instruction
- > Scheduled Teaching
- > Course Evaluations
- > Curricular Advising
- > Teaching Innovation
- > NIH
- > NSF
- > Publications
- > Presentations
- > Significant Works in Public Media
- > Creative Scholarship
- > Reviews of Creative Research/Scholarship

Select the screen name for the data export and Save.

Data to Include ✕

Include All

> Most Recent

▼ Common Items

- > Personal and Contact Information
- > Biography and Expertise
- > Educational Background
- > Post-Graduate Training
- > Tenure and Rank
- > Appointments at UMD
- > Other Employment
- > Continuing Education
- > Professional Certifications and Licenses
- > Professional Memberships
- > Honors and Awards
- > Research Advising
- > Participation in Thesis/Dissertation Committees
- > Mentorship - Guiding Professional Development
- > Professional and Extension Education
- > Non-Credit Instruction
- > Scheduled Teaching
- > Course Evaluations
- > Curricular Advising
- > Teaching Innovation
- > NIH
- > NSF
- ▼ **Publications**
 - Contribution Type
 - Explanation of "Other"
 - Current Status
 - Title of Contribution

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.