# UNIVERSITY OF MARYLAND

## THE OFFICE OF FACULTY AFFAIRS

# Faculty Success:

# Administrator's Guide

# Welcome to Faculty Success!

Faculty Success (formerly called Digital Measures) is a platform from Watermark. It is a fully customizable online information management system designed to organize and report on your faculty's 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 lessens the burden of periodic reviewing and reporting of faculty by academic administrators (e.g., department chairs, center directors and deans). Instead of having to run/create each faculty's report separately as a reviewer, Faculty Success gives you the ability to run a single report for all faculty in your department, center, or school/college. Additionally, Proxy users are able to "login" as faculty and manage and/or review data in Faculty Success. 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, [faculty.umd.edu/activity](faculty.umd.edu/activity) and use the Log In button. You'll use CAS to authenticate.

Proxy users need to have the faculty member authorize the proxy access. This can be accomplished using the [online authorization form](). If you encounter any issues while filling out the online form, you can alternatively complete this [Word version]() of the form. Sign the form, scan it and send the scan file to *[dm-help@umd.edu]()*.

# 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 your own activities, if you are a faculty user.



As a proxy user, the home screen looks different. It is the Manage Data screen which you will use to manage another faculty member's activities.

*Important Note: The utilities and functionally that are displayed here will depend on whether you are a Faculty Admin or non-faculty Proxy User in Faculty Success. If you are both a faculty and admin (e.g. chair, director or dean) you will have more options than a proxy user (e.g. administrative support).*

Reports can be generated through the Reports button in the top navigation bar, or from the Rapid Reports button available on every screen. Note that Rapid Reports has fewer filter/configuration settings; use the Reports button to get full functionality.

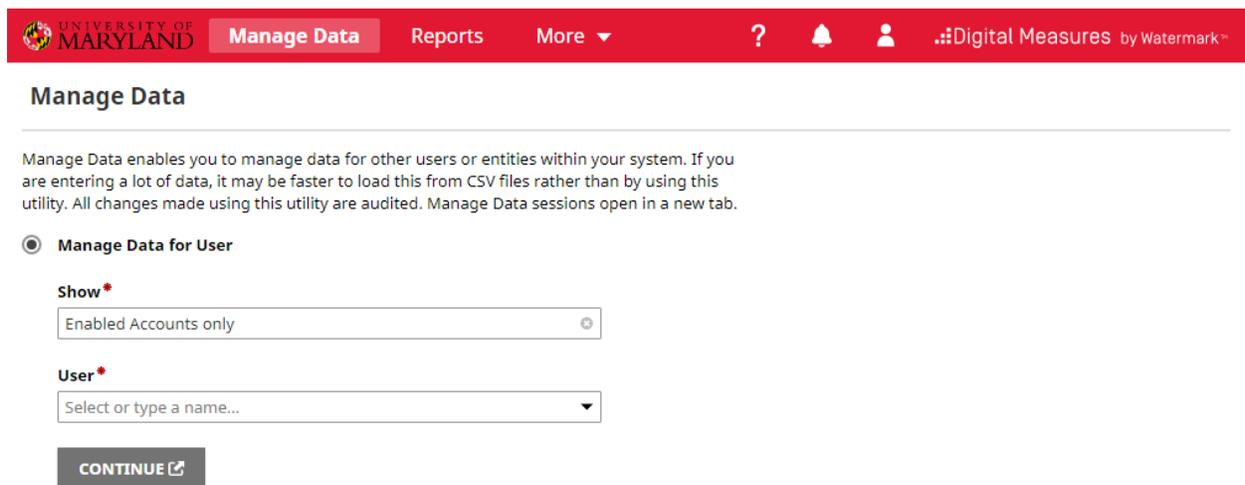# Integrated Systems: Data Automatically Loaded for You

Some screens' activity data is populated through integrations with other campus systems. Refer to the [Integrations table](#) for the most up to date information.

# Manage Data

The Manage Data screen is the default home page for non-faculty proxy users. It is also available to administrative users at the departmental or college level through the top navigation bar. This utility allows the user to review Faculty Success data as a faculty member (i.e. view data as the faculty). Proxy access users will also be able to edit faculty data. Chairs, directors and deans can view faculty data but not manage/edit it.

To manage/view data for a faculty:

1. Click on the **Manage Data** link in the top navigation menu.
2. Select the faculty from the **User Dropdown** List.
3. Click on the **Continue** button.



Once you are actively managing data for the faculty member, a new browser window will open and the navigation menu will appear slightly different – based on how it appears for the faculty. **There is also a black bar near the top of the screen to let you know for which faculty you are managing data.**

To *stop* managing data for a user, simply click on the X icon in the black bar, or close the active window. This should return you back to the main Manage Data screen.

# Reports

## Built-in Reports

The Reports component allows users to run a variety of built-in reports or create custom reports. This guide and its screenshots will reference the most commonly used report - **Annual Activity Report**.

In addition to the Annual Activity Report, administrative users with Departmental or College-level access in the system can run reports for some or all of the faculty in their unit. In running these reports, it is important to consider which faculty will be included - any faculty with a current appointment in the unit, or whose primary appointment is in the unit, or, if tenured/tenure-track, whose tenure home is in the unit. See the *Whom to Include* explanation below.

The following reports have been configured to aggregate reported information across a set of faculty:

- **Summary Activity Report**: Counts accomplishments for faculty included in the report in the areas of Research, Teaching and Service. Tables of information for each of these three areas. The first row of the table reports the aggregation across the entire set of faculty included in the report. The following rows report the counts by faculty member.
- **Summary of College Activity Report:** Similar to the Summary Activity Report, this report counts accomplishments for the faculty included in the report in the areas of Research, Teaching and Service. Multiple tables are presented within each of these areas, one per

unit/department within the college. Aggregation counts for the college in each of the three areas is included, along with aggregation counts for the unit and faculty within the unit.

An additional set of reports provide faculty information in one report from a particular data screen:
- Academic Degrees Earned
- Awards and Honors
- Biography and Expertise
- Contracts, Grants and Sponsored Research by Faculty
- Creative Scholarship by Faculty
- Editorial and Review Activities by Faculty
- External and Community Service by Faculty
- Faculty/Staff Directory
- Presentations by Faculty
- Publications by Faculty
- Scheduled Teaching by Faculty

## Selecting Report Options

There are several different reporting options that can be specified for a report in **Reports**:

**Report Type**: the first screen shown after clicking on *Reports* will list all the available reports in Faculty Success. Select the type of report you wish to run from this page. Once selected, the next screen will display the reporting options for the selected report.

**Reports**

Select the report you would like to view.

| Name ▲ | Created By | Actions |
|--------|-----------|---------|
| Annual Activity Report | Digital Measures | 🔒 |
| NIH Biographical Sketch | Digital Measures | 🔒 |

1) **Date Range**: specify a Start Date and End Date for the report to retrieve results within certain time periods (e.g. one year, multiple years, x amount of months). The default date range for most reports is the current calendar year; for the UMD Vita it is from 1925 to present.

2) **Whom to Include**: by default, all faculty members within your department/school (based on your security role) will be included on the report output. This option allows you to run a report for select faculty members (individuals only), or for the entire department, school/college, or campus (dependent on your role). To select certain individuals, or an entire group, click on the Change Selection link in option 2.



3) Individuals or groups to include:Change Selection opens a popup window and gives access to five different means of selecting faculty to include in the report:
   a. **Assigned Base County** - This filter is to be used for University of Maryland Extension faculty only based on county assignment.
   b. **Cluster or State Assignment** - This filter is to be used for University of Maryland Extension faculty only based on geographic and/or program assignment.
   c. **College** - all faculty who currently have an appointment in the selected college. The list of colleges in this category covers the set of colleges in which faculty in your scope have appointments.
   d. **Department-** all faculty who currently have an appointment in the selected department or center. The list of departments in

this category covers the set of departments in which faculty in your scope have appointments.

e. **Individual** - individually identified faculty; all faculty in scope of the administrative user are listed.

f. **Primary College** - all faculty who have their current primary appointment in PHR in the selected college.

g. **Primary Department**- all faculty who have their current primary appointment in PHR in the selected department/center.

h. **Program or Administrative Assignment** - This filter is to be used for University of Maryland Extension faculty only based on program or administrative assignment.

i. **TTK** - all tenure/tenure-track faculty.

j. **Tenure Home College** - all faculty with their tenure home in the selected college.

k. **Tenure Home Department** - all faculty with their tenure home in the selected department.

Use the right-facing caret to expand the particular category and select options within it. Selections can be made in more than one category and to include more than one option within a particular category.

4) To select those faculty who are tenured in your college or department/center, open the **Tenure Home College** or **Tenure Home Department** category and select your college or department/center from the set of possible options.

5) Click on the Save button to finish.

**Individuals or groups to include**                                    ✕

❯ ☐ **College**

    ☐ A. James Clark School of Engineering

    ☐ Agriculture & Natural Sciences

    ☐ Chemical & Life Sciences

    ☐ College of Agriculture & Natural Resources

    ☐ College of Arts & Humanities

    ☐ College of Behavioral & Social Sciences

    ☐ College of Computer, Math & Natural Sciences

    ☐ College of Education

    ☑ College of Information Studies

    ☐ Division of Information Technology

    ☐ Facilities Management

    ☐ Graduate School

    ☐ Libraries

    ☐ Office of Extended Studies

    ☐ Office of Professional Studies

    ☐ Office of the President

    ☐ Philip Merrill College of Journalism

    ☐ Robert H. Smith School of Business

    ☐ School of Architecture, Planning, & Preservation

                        [ Cancel ]   [ Save ]

6) File Format: choose your output file format (MS Word, PDF, or Web page) and page size (Letter, A4) under this reporting option.

7) Select **Run Report** to generate the report.

## Special Reporting Situations

When faculty leave the institution, their accounts are disabled but their data remains in place in the system. If you find that you need to include faculty in a report after they have left, you will need to add them to your **Whom to Include** selection, and change the setting of the **Include These Accounts** option:

1. After selecting the group of faculty you need included in your report (e.g., by Department, College or Tenure Home Department), use the Individual selector to add those faculty who have left the institution but need to be included in the report.

## Individuals or groups to include

> ☐ Assigned Base County

> ☐ Cluster or State Assignment

> ☐ College

> ☐ Department

> ☐ Individual

> ☐ Primary College

> ☐ Primary Department

> ☐ Program or Administrative Assignment

> ☐ TTK

> ☐ Tenure Home College

> ☐ Tenure Home Department

Cancel     Save

2. After saving this selection, choose "Enabled and Disabled Accounts" for the **Include These Accounts** option.



3. Run your report.

## 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.