How to Export and Make Changes to Reports in Faculty Success

Question: My college has us **Bold** and/or <mark>Highlight</mark> the "New" information in our reports when submitting reappointments each year. How would I do this in Faculty Success?

Answer: You would need to export the reappointment report as a Word document. Once you have made the special formatting changes required by your college you will then save the updated file and upload this report into Workflow.

Office of Institutional Research

1. <u>**Click**</u> on the report you wish to use for your export

Example: We are using the "VPA Reappointment Report", Click on the Name of the report to see your information.

Activities	CV Imports	Manage Data	**Reports**	Workflow ▾	Tools ▾

Reports

<u>Pool A Reappointment Review</u>

📄 Export Usage   ➕ Create a New Report

Name	Created By ▲	Actions
Doermer School of Business Reappointment Review		🔒
ETCS Reappointment Review		🔒
Evaluations Report by Faculty		🔒
Honors and Accomplishments of Faculty		🔒
My PFW Vita		🔒
		🔒
SoE Reappointment Review		🔒
<u>VPA Reappointment Review</u>		🔒
		🔒
		🔒
Walter E. Helmke Library Reappointment Review		🔒

2. Once in the report, <u>click</u> on the 'Options' tab to see the drop-down menu

‹ **Run VPA Reappointment Review**

⊟ Save Report

Options

College of Visual and Performing Arts
Faculty Reappointment

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Staff
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A. GENERAL INFORMATION

1. Educational Experience

3. From the 'Options' tab drop-down menu, <u>Select</u> Date Range under the Filter options.

Activities **CV Imports** **Manage Data** **Reports** **Workflow** ▾ **Tools** ▾

< **Run VPA Reappointment Review**   💾 Save Report

Web Profiles		Admin		Format	Filter	Export			
Disable ⬤	</>	⤳	👤	¶	📅	👥	Exclude ⬤	📕	📘
Snippet	Embed	Share	Preview As	Text	Date Range	Group	Blank Sections	PDF	Word

Options

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Faculty Reappoint___ ___

Ms. Lindsey ___ ___
Purdue Unive___ ___ ayne
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du___ ___@pfw.edu

A. GENERAL INFORMATION

1. Educational Experience

4. <u>Set</u> the date range that you need for your report. Hit 'Apply' once date range is set.

This faculty member started as tenure-track in August of 2021 and has pending publications so set the End Date out several years.

5. From the 'Options' tab drop-down menu, <u>Select</u> Word

6. Your report will start generating in Word.

Once the report is created you will need to **click** on 'Enable Editing' to allow you to **Bold** and/or <mark>Highlight</mark> the new entries for 2022 for your reappointment review report.
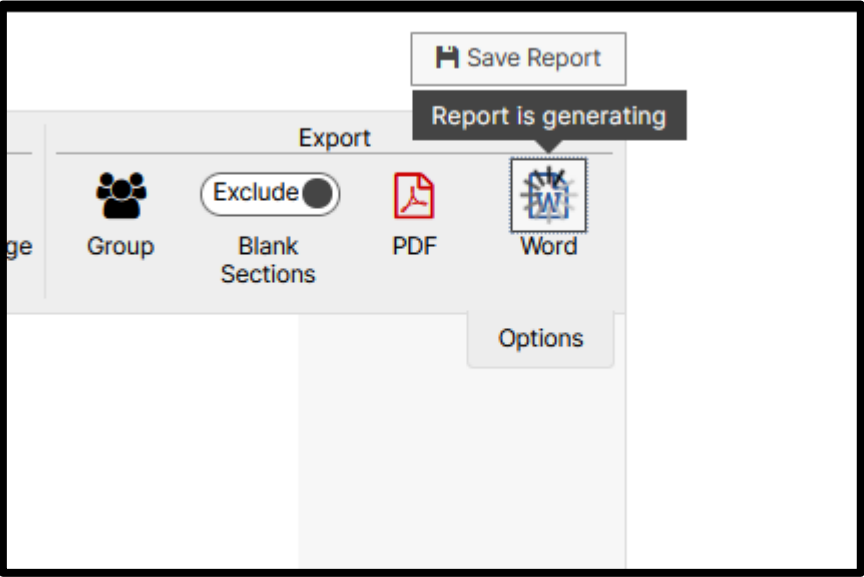
H Save Report

Report is generating

Export

Group

Exclude ●

Blank Sections

PDF

Word

Options

AutoSave Off | VPA+Reappointment+Review-20220907-035442-CDT - Protected View • Saved to this PC ∨ | Search (Alt+Q) | Lindsey Dutrieux LD | Comments | Share

File | Home | Insert | Draw | Design | Layout | References | Mailings | Review | View | Developer | Help | Acrobat

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. | Enable Editing

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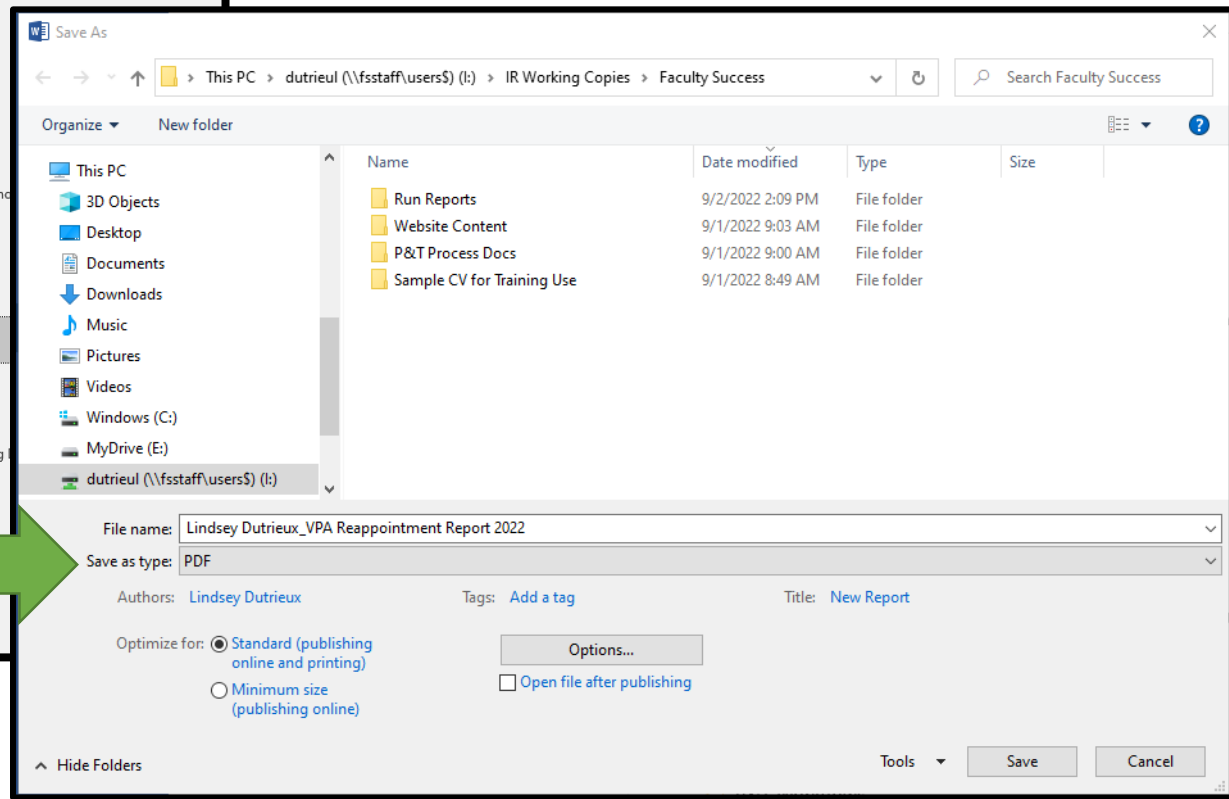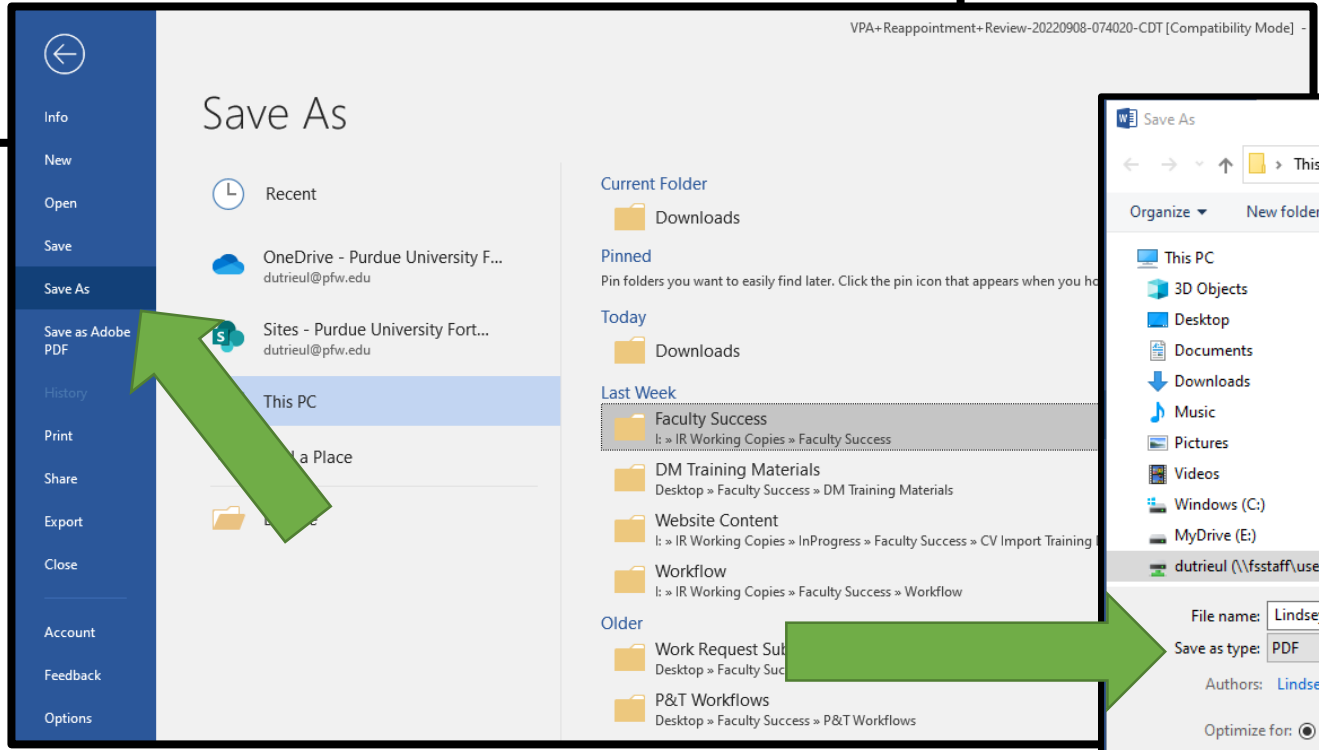(260) 481-0797
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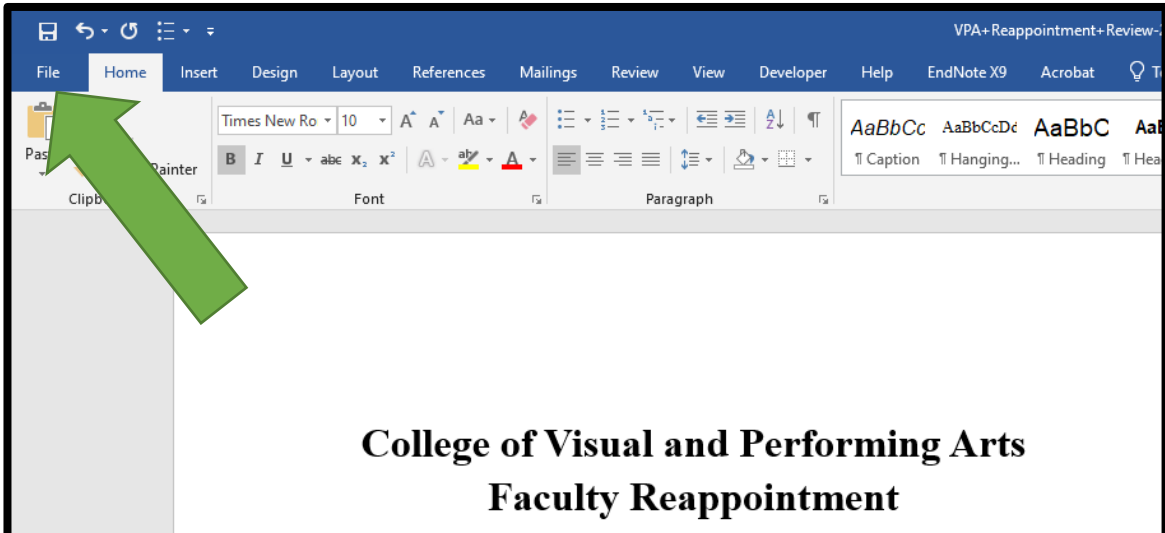
7. After you have made the changes needed to the Word document.
Click File > Save As > PDF

Save in a location that you will remember and is secure

8. Once you are ready to submit in Workflow, click the 'Drop files here or click to upload' text in the correct box on the report submission page

Reappointment Recommendation

Purdue University Fort Wayne

Faculty Step for Attaching Documents

Attention: Once you have your reports attached and send to the next step; **THIS SCREEN WILL BE LOCKED**.
Please review your document carefully before your send to the next person in the workflow.
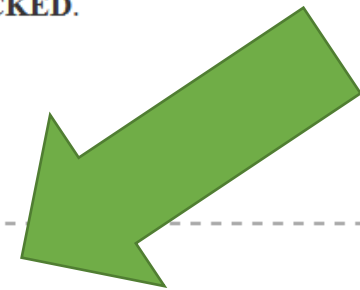
If you have any questions, please contact Lindsey Dutrieux dutrieul@pfw.edu 1-0797

* Reappointment Report (PDF)

> Drop files here or click to upload

* Curriculum Vitae

> Drop files here or click to upload

If you have any questions please contact Lindsey Dutrieux *1-0797* dutrieul@pfw.edu