

JULY 2022

FACULTY SUCCESS BY WATERMARK

GUIDE

Introduction

- This is a brief overview of the functionality of Faculty Success (FS)
- More detailed information and resources are available [here](#)

Faculty Success

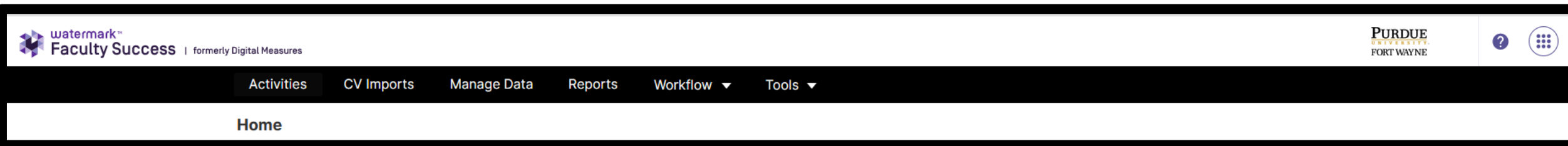
- Online information management system
- Organizes and reports on faculty activity and accomplishments
- Serves as a reporting tool;
 - Aggregates faculty activity for accreditation purposes,
 - Eliminates need for ad-hoc report requests, and
 - Produces CVs for faculty use

How to Login

- Secure, permissions-based sign in
- Single-sign on with PFW credentials
 - Note: Authentication issues with FS will be handled by the OIR, by submitting an online request

Main Navigation

- The top navigation menu is a permanent fixture



- The main links provide access to all available functionality
- The following slides will detail basic functionality of Faculty Success

Main Navigation



- Main Navigation bar:
 - **Activities:** Enter faculty information
 - **Tools:**
 - **Rapid Report Tool:** Generate a CV, bio-sketches, or annual reports
 - **Help:**
 - **Contact us!:** Either through Faculty Success or the [Internal Administrator](#) directly
 - **Resource Center:** Knowledge base provided by Faculty Success

IMPORT A CV

Importing a CV



- Data already exists in faculty CV's
- Ensures quality, while reducing manual entry
- Makes data available for different purposes (i.e. Accreditation)

Note: You will need to validate your information when using the Imports function. A short video tutorial of how to do this is on our resource site

Importing a CV

- Drag and drop a CV (.doc, .docx, .odt, .rtf) or select a file from the dialogue box.
- Click **Begin** to start the process.

Select A File

Welcome to CV Imports. This tool will allow you to easily upload entries from your CV and convert them into records in **Activities**.

To begin the process, we'll need you to upload your CV. If you've already done this and would like to continue, open the link under Drafts in Progress.

Upload New CV

Drop file (.doc, .docx, .odt, .rtf) here or
select to upload

Once you've selected your file, move on to the next step. Make sure you've uploaded the correct file before moving on.

BEGIN

Importing a CV

- Select the **Activity Type** to:
 - Create,
 - Update, or
 - Modify
- Instructions will appear on how to complete the **highlighting** process

Highlighting Instructions

▶ Keyboard Instructions

Highlighting Text

Gazette, 0(One Stack), 12-24. http://en.wikipedia.org/wiki/Working_paper

Roberts, A., Johnson, J., Nettleman, M., Richards, N. (2003). Why Dark Matter is Dark: An Exploration of the Cosmos. *Dark Matter Times, Presumably(About 85%), -1. http://en.wikipedia.org/wiki/Dark_matter*

Brown, H. (1989). *IRS Publication 1034- Federal Tax Guidelines for Nonprofit Organizations*. Washington D.C.:

Brown, H. (1977). *The inequality of pay*. Univ of California Press.

Presentations

Brown, H. (Presenter & Author), American Institute of Certified Public Accountants Annual Conference, "GAAP and Financial Statements," American Institute of Certified Public Accountants. (May 15, 2012).

Brown, H. (Presenter & Author), American Association of Accounting Educators Annual Fall Conference, "The Regulations of Professional Accounting Education," American Association of Accounting Educators. (November 5, 2004).

Brown, H. (Author Only), AAA Annual Meeting, "Tax Code Problem Solving," The American Accounting Association. (November 15, 1994).

Contracts, Fellowships, Grants and Sponsored Research

Brown, H., "Environmental Sustainability Research Grant," Sponsored by EPA, Federal, \$500.00. (February 1, 2016 - January 1, 2017).

When prompted to highlight text, use your mouse to select the relevant information from your CV

Removing a Highlight

Roberts, A., Johnson, J., Nettleman, M., Richards, N. (2003). Why Dark Matter is Dark: An Exploration of the Cosmos. *Dark Matter Times, Presumably(About 85%), -1. http://en.wikipedia.org/wiki/Dark_matter*

Importing a CV

- Faculty Success will prompt you to select the appropriate information by highlighting the text.
- Certain fields will require manual entry.
- If you believe a **Required Field** for a certain entry **Activity Type** should not be required, you can submit a request for this to be reviewed.

Custom CV Reports

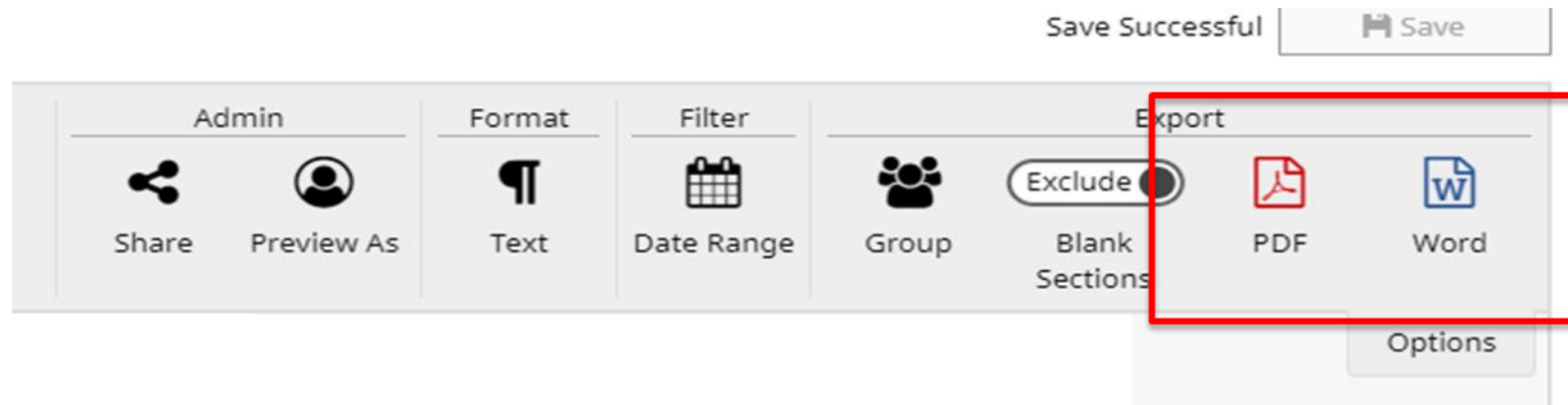
- Once a CV has been created or imported
 - Click on the **Reports** link in the main navigation menu.



- Click on the **Create New Report** button
- Choose the Vita option (easiest way to customize a CV)
- The CV will be auto-populated based on data already entered in Faculty Success

Custom CV Reports (con't)

- Faculty Success' Resource Center provides written and video content on how to customize a CV, such as;
 - Reformatting your CV,
 - Filtering Data displayed in Activity Sections, and
 - Applying a Date Range (or overriding date range selections)
- Once finished a PDF or Word document can be exported



MANAGE ACTIVITIES

Manage Activities

- The main content area is organized into several sections. Each category has specific sub-categories (screens)
 - Click on the links for each screen to access that page/screen

Activities CV Imports Manage Data Reports Workflow Tools

Search All Activities Search Tips Rapid Reports PasteBoard

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

▼ **General Credentials/Expertise**

- Personal and Contact Information
- Biography and Expertise
- Degrees
- Graduate/Post-Graduate Training
- Licenses and Certifications
- Awards and Honors
- Media Appearances and Interviews
- Faculty Development Activities Attended
- Narratives

▼ **Career Information**

- Professional Positions
- Administrative Assignments
- Consulting
- Professional Memberships

▼ **Teaching/Mentoring**

- Teaching Narrative
- Teaching Innovation and Curriculum Development
- Directed Student Learning (e.g., theses, dissertations)
- Mentoring
- Scheduled Teaching
- Evaluation Data
- Narratives (Expires August 31st, 2022)
- Peer Comments
- Evidence of Student Learning
- Other Evidence of Teaching Effectiveness
- Non-Credit Instruction Taught
- Yearly Advising Summary

▼ **Scholarship/Research**

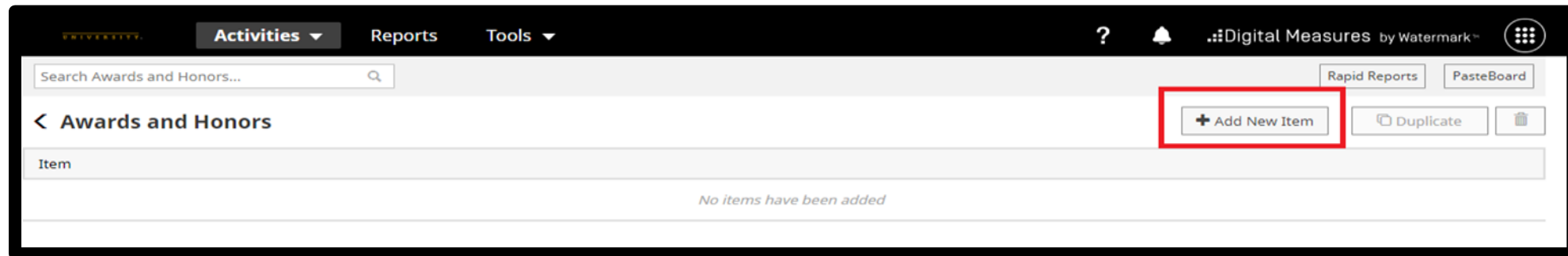
- Research Narrative
- Publications
- Presentations
- ABET Vitae
- Contracts, Fellowships, Grants and Sponsored Research
- Exhibits and Performances
- Intellectual Property (e.g., copyrights, patents)
- Other Evidence of Effectiveness in Research and Creative Endeavor
- Research Activity

▼ **Service**

- Service Narrative
- Continuing Education Service
- Other Evidence of Effectiveness in Service
- University Service
- Professional Service
- Public Service

Adding an Item

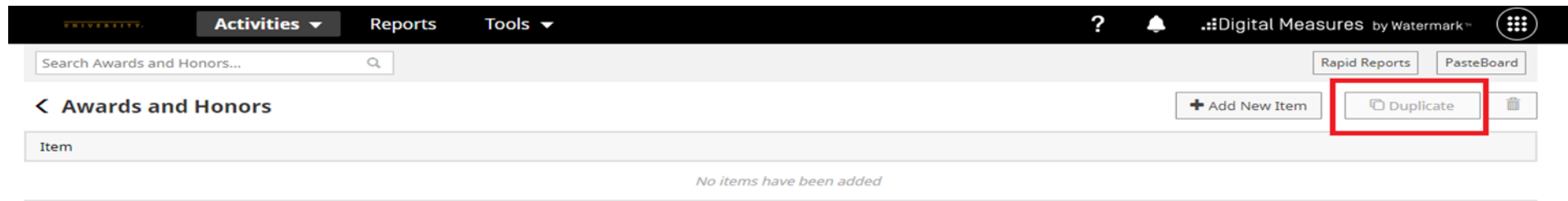
- Items represent any activity or record.
- The **+ Add New Item** button at the top of the screen after selecting an option.



- Click this button, then enter information into the form.
 - Note: The only required field to save an item is the date (YYYY format)

Duplicating an Item

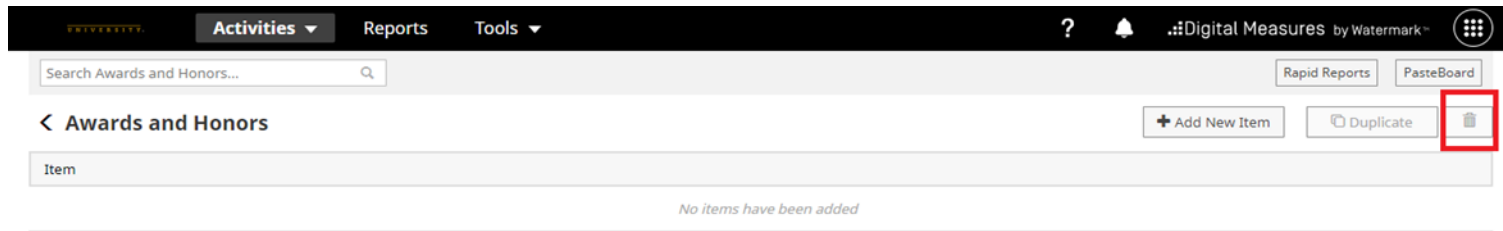
- Once an item is created, you can Duplicate that item.



- This button allows you to create an identical entry, which you can then modify with the necessary changes.

Removing an Item

- The same process to duplicate an item can be used to delete the item altogether
- Selecting the item and clicking on the **Trash** can button.



- The system will prompt you to ensure you would like to complete the action.

Allow Sharing

- Faculty Web Profiles will be directly pulling for FS
- Faculty can choose what is allowed to be viewable content in the following screens;

Biography and Expertise

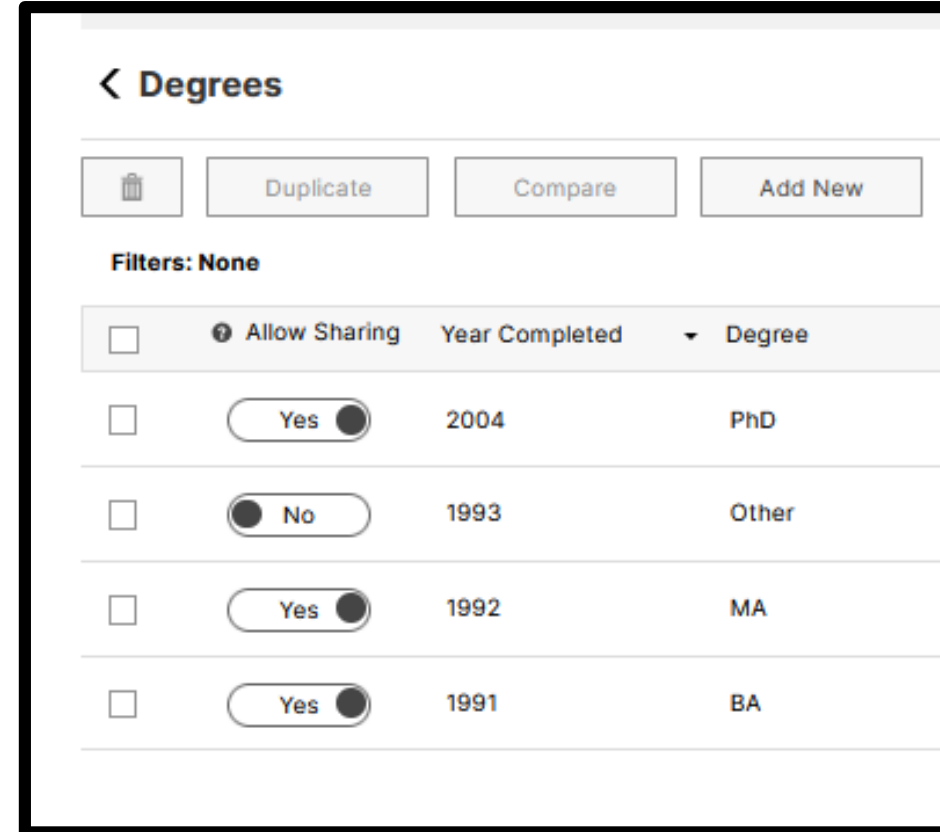
Degrees

Scheduled Teaching

Presentations

Publications

- If you DO NOT wish to show information on your public profile: Please make sure the 'Allow Sharing' button displays 'No' next to the specific entry you want hidden



The screenshot shows a web interface for managing degrees. At the top, there is a back arrow and the title "Degrees". Below the title are four buttons: a trash icon, "Duplicate", "Compare", and "Add New". Underneath these buttons, it says "Filters: None". The main content is a table with the following columns: a checkbox, "Allow Sharing" (with a toggle switch), "Year Completed", and "Degree".

<input type="checkbox"/>	Allow Sharing	Year Completed	Degree
<input type="checkbox"/>	Yes	2004	PhD
<input type="checkbox"/>	No	1993	Other
<input type="checkbox"/>	Yes	1992	MA
<input type="checkbox"/>	Yes	1991	BA

IMPORTING AN EXISTING PUBLICATION

Publications – Importing Items

- There are two ways in which you can import an item (Note: this can only be done from the **Publications** category)

- BibTeX File

- Import from a Third Party

The screenshot shows the 'Import Publications' interface. At the top, there is a back arrow and the title '< Import Publications'. Below the title is a paragraph: '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.'

There are two main sections, each highlighted with a yellow border:

- Import from a BibTeX file**: This section is titled 'Import from a BibTeX file' with a help icon. It contains the text 'Import publications from other software or databases such as:' followed by a list of options: EndNote, Mendeley, HeinOnline, Google Scholar, RefWorks, and Zotero. A 'Choose File...' button is located at the bottom right of this section.
- Import from a Third Party**: This section is titled 'Import from a Third Party' with a help icon. It contains the text 'Select a service:' followed by two radio buttons: 'Crossref' (selected) and 'PubMed'. Below this is the 'Search criteria:' section, which includes a dropdown menu for 'Author' (set to 'Irah Modry-Caron'), a date range for 'Publication Date' (from '2015/02/24' to '2020/02/24'), and a link for 'Add search criteria'. A 'Search Crossref >' button is at the bottom right of this section.

Importing from a BibTeX File

- Download the citation file
- Click on the **Publications** button
- Click on the **Import** button
- Under the **Import from BibTeX**, click on the **Choose File** button and select the citation file from the appropriate folder
- Click **Continue**
- The next screen will prompt you to match the publication with other Purdue Fort Wayne accounts. We recommend that you skip over this section and do not match user accounts. Click on the **Continue** button. If the continue button is not active, the system is requiring that you either match to a user or select no match.
- Review your item(s) to be imported and click on the Finish Import button to complete importing the items.

Importing from a Third Party

- Click on the **Publications** link
- Click on the Import from Third Party section, select the third party source from the drop-down menu.
- Use multiple criteria to search for your publication.
 - **Crosref Search** and **PubMed Search**: To add criteria, click on the **Add Search Criteria** link.
- Then, click on the **Search** button.
- Click on the checkmark box for the publications you wish to import. Then, click **Continue**.
- The next screen will prompt you to match the publication with other Purdue Fort Wayne user accounts. We recommend that you skip over this section and do not match user accounts. Click on the **Continue** button. If the continue button is not active, the system is requiring that you either match to a user or select no match.
- Review your item(s) to be imported and click on the Finish Import button to finalize the addition of the publication.

Match Collaborators

- Step 3 of the **Import Publications** feature
- Recommended to skip this step
 - If unable to skip, select the **no match** to continue

Faculty Delegates

- Faculty can assign other individuals as one-to-one delegates
- These individuals can access and manage data and run reports for faculty.

Questions?

Please contact your Internal Administrator with any questions you may have while in the Faculty Success system



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