

JULY 2022

HOW TO RUN A REPORT IN FACULTY SUCCESS

Overview and Training

Introduction

One of the great benefits to campuses is the ability to use their Faculty Success to run common faculty reports for administration. Common reports we run most often are:

- Faculty CVs
- Scheduled Teaching (Individual/Department/College)
- Faculty Degree Audits/ Credentials
- Faculty Publications/ Intellectual Properties
- Annual Service Report
- Annual Awards and Honors

Running a Report

Q: We need all department/college **CVs** for accreditation purposes

A: You can run a **VITA Report**

- First navigate to the Reports tab
- Select the “**VITA**” report template by Watermark

The screenshot shows a navigation bar with the following items: UNIVERSITY, Activities, CV Imports, Manage Data, Reports (highlighted with a yellow circle containing '1'), Tools, a question mark, a bell icon, and Digital Measures by Watermark. Below the navigation bar, there is a table of reports:

HLC Scholarship and Research Summary	Watermark	🔒
Intellectual Contributions by Faculty	Watermark	🔒
Presentations by Faculty	Watermark	🔒
Scheduled Teaching by Faculty	Watermark	🔒
Vita	Watermark	🔒

Running a Report

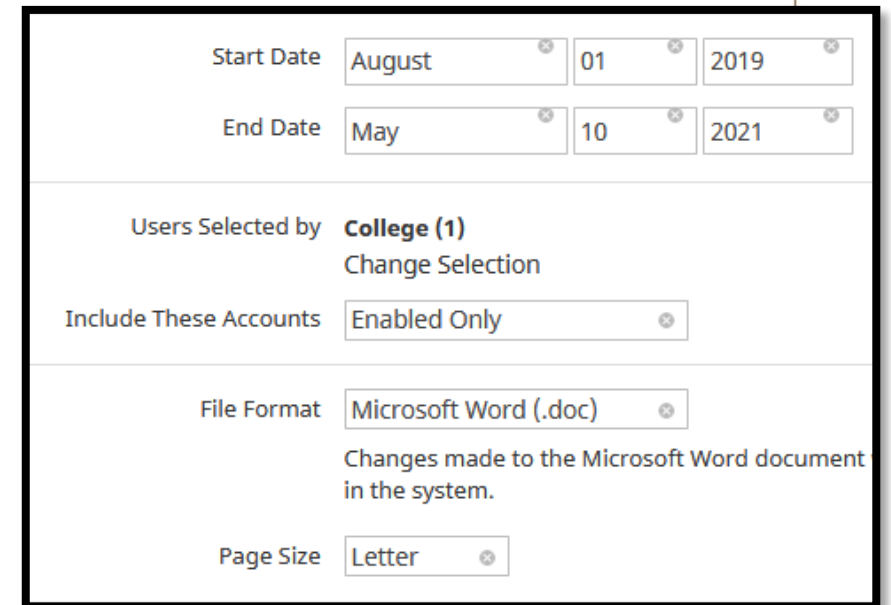
Q: We need all department/college CVs for accreditation purposes

A: You can run a VITA Report

▪ Set all necessary parameters needed for your report to run;

- Date range - i.e. Fall 2019 – Spring 2021
- Whom to Include – under *Users Selected by*; choose your faculty member
 - Remember to hit Save at the bottom of this form
 - Enabled Only those you wish to view schedules for
- File Format needed - Save as Word.doc or PDF

▪ Hit Run Report

A screenshot of a web-based configuration form for running a report. The form is divided into several sections. The first section contains date pickers for "Start Date" (August 01, 2019) and "End Date" (May 10, 2021). The second section is titled "Users Selected by" and shows "College (1)" selected, with a "Change Selection" link below it. The third section is "Include These Accounts" with a dropdown menu set to "Enabled Only". The fourth section is "File Format" with a dropdown menu set to "Microsoft Word (.doc)" and a note below it: "Changes made to the Microsoft Word document in the system." The final section is "Page Size" with a dropdown menu set to "Letter".

Start Date	August	01	2019
End Date	May	10	2021
Users Selected by	College (1) Change Selection		
Include These Accounts	Enabled Only		
File Format	Microsoft Word (.doc) Changes made to the Microsoft Word document in the system.		
Page Size	Letter		

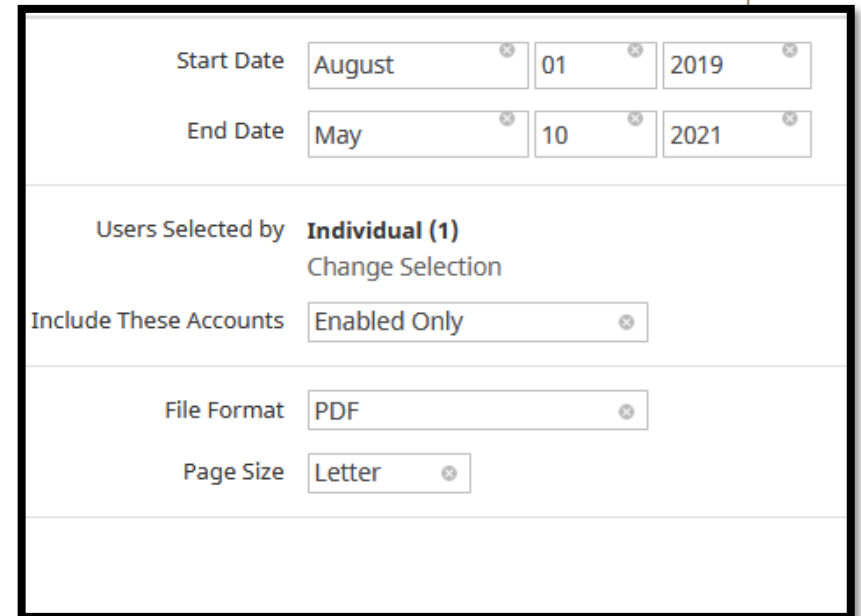
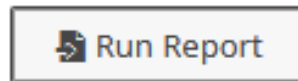
Running a Report

Q: I need the **courses taught of my faculty members from Fall 2019 - Spring 2021**

A: You can run a **Scheduled Teaching by Faculty report**

- Set all necessary parameters needed for your report to run;
 - Date range - i.e. Fall 2019 – Spring 2021
 - Whom to Include – under *Users Selected by*; choose your faculty member
 - Remember to hit Save at the bottom of this form
 - Enabled Only those you wish to view schedules for
 - File Format needed - Save as Word.doc or PDF

- Hit Run Report

A screenshot of a web-based report configuration form. The form is white with a black border and contains several input fields. The "Start Date" field is set to "August 01 2019" and the "End Date" field is set to "May 10 2021". The "Users Selected by" dropdown is set to "Individual (1)" with a "Change Selection" link below it. The "Include These Accounts" dropdown is set to "Enabled Only". The "File Format" dropdown is set to "PDF" and the "Page Size" dropdown is set to "Letter".

Start Date	August	01	2019
End Date	May	10	2021
Users Selected by	Individual (1) Change Selection		
Include These Accounts	Enabled Only		
File Format	PDF		
Page Size	Letter		

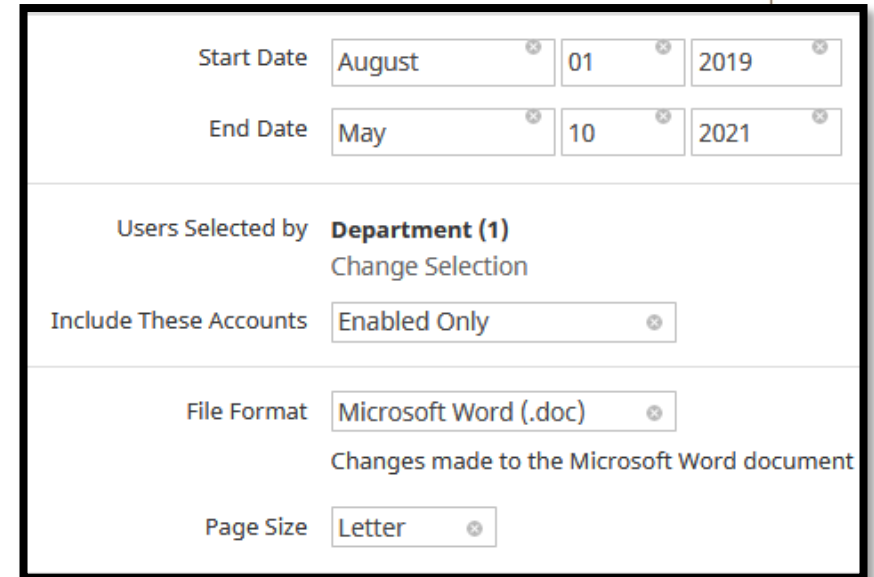
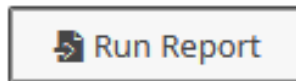
Running a Report

Q: We need to provide our faculty credentials

A: You can run a HLC Qualifications Report by Faculty report

- Set all necessary parameters needed for your report to run;
 - Date range - i.e. Fall 2019 – Spring 2021
 - Whom to Include – under *Users Selected by*; choose your desired department
 - Remember to hit Save at the bottom of this form
 - Enabled Only those you wish to view schedules for
 - File Format needed - Save as Word.doc or PDF

- Hit Run Report

A screenshot of a web-based form for generating a report. The form is divided into several sections. The top section contains two rows of date pickers: "Start Date" with values "August", "01", and "2019"; and "End Date" with values "May", "10", and "2021". Below this is a section for "Users Selected by" with a dropdown menu showing "Department (1)" and a "Change Selection" link. The next section is "Include These Accounts" with a dropdown menu showing "Enabled Only". The "File Format" section has a dropdown menu showing "Microsoft Word (.doc)" and a note "Changes made to the Microsoft Word document". The "Page Size" section has a dropdown menu showing "Letter".

Start Date	August	01	2019
End Date	May	10	2021
Users Selected by	Department (1) Change Selection		
Include These Accounts	Enabled Only		
File Format	Microsoft Word (.doc) Changes made to the Microsoft Word document		
Page Size	Letter		

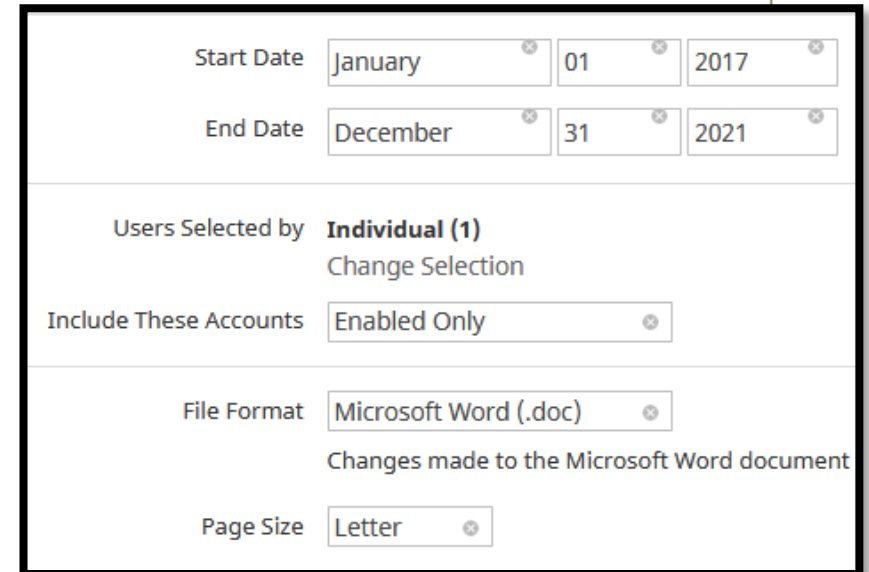
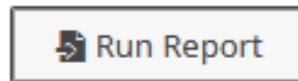
Running a Report

Q: Need the last four years of publications for a faculty member in our department

A: Run a **Intellectual Contributions by Faculty report by Watermark**

- Set all necessary parameters needed for your report to run;
 - **Date range** - i.e. Jan 1, 2017 – December 31, 2021
 - Whom to Include – under *Users Selected by*; choose your faculty member
 - Remember to hit Save at the bottom of this form
 - Enabled Only those you wish to view schedules for
 - File Format needed - Save as Word.doc or PDF

- Hit Run Report

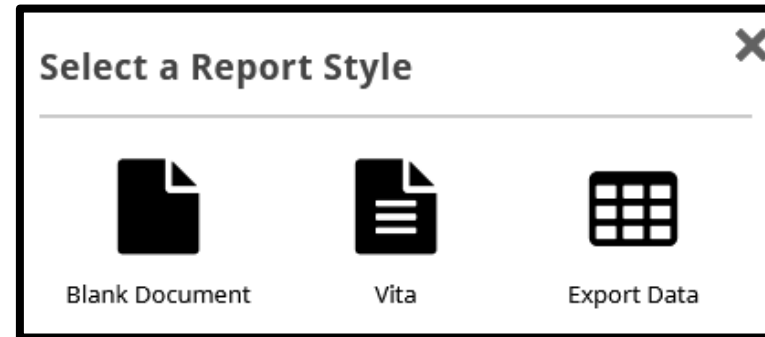
A screenshot of a web form for generating a report. The form is divided into several sections. The top section has two rows for date selection: "Start Date" with dropdowns for "January", "01", and "2017"; and "End Date" with dropdowns for "December", "31", and "2021". Below this is a section for "Users Selected by" with a dropdown set to "Individual (1)" and a "Change Selection" link. The next section is "Include These Accounts" with a dropdown set to "Enabled Only". The "File Format" section has a dropdown set to "Microsoft Word (.doc)" and a note "Changes made to the Microsoft Word document". The "Page Size" section has a dropdown set to "Letter".

Start Date	January	01	2017
End Date	December	31	2021
Users Selected by	Individual (1) Change Selection		
Include These Accounts	Enabled Only		
File Format	Microsoft Word (.doc) Changes made to the Microsoft Word document		
Page Size	Letter		

Making your own reports

Any information that is stored in DM can be used to create a custom report for your unit using the 'Create a New Report button' and then shared with others to use

+ Create a New Report

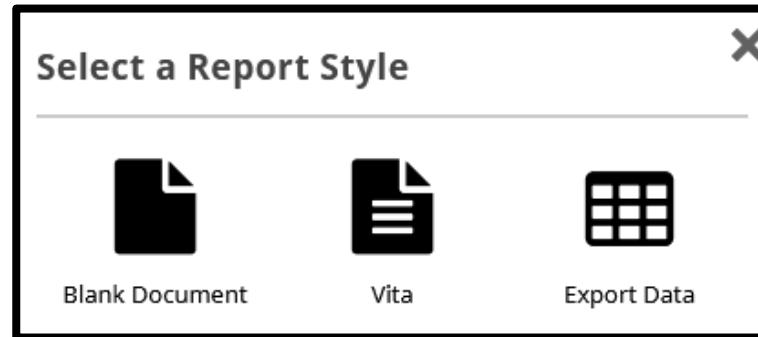


Starts as a standard system Vita document where Activities can added/edited/customized

Making your own reports

Any information that is stored in DM can be used to create a custom report for your unit using the *'Create a New Report button'* and then shared with others to use

+ Create a New Report

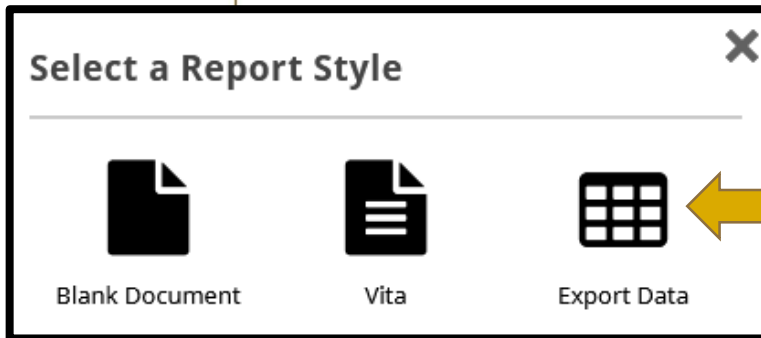


No data is being pulled and the creator (you) can begin with Section Headings

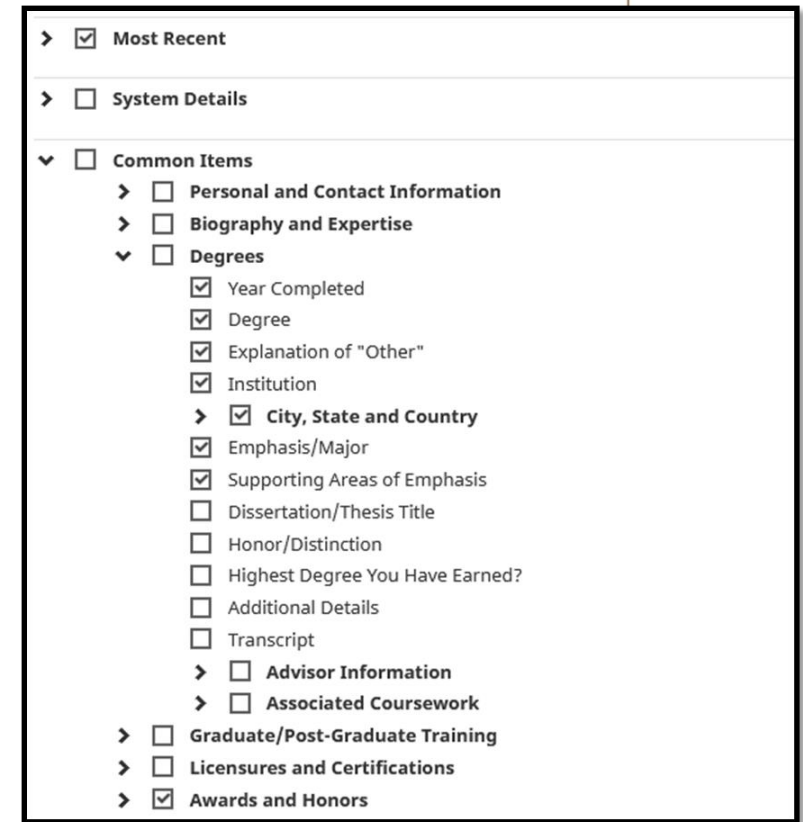
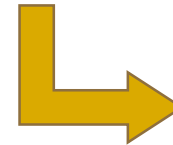
Making your own reports

Any information that is stored in DM can be used to create a custom report for your unit using the 'Create a New Report button' and then shared with others to use

[+ Create a New Report](#)



Allows you to select data to include, Grouping Method, and File Format (.csv or XML)



< Create a New Report

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 Staff
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Courses Taught
No items exist for Scheduled Teaching

Faculty Development

Activities from Faculty Development Activities Attended

Filter Group by

No items exist for Faculty De

- Ignore date range filter
- ▼ **Activity Type**
 - Conference Attendance
 - Continuing Education Program
 - Faculty Internship
 - Faculty Fellowship
 - Self-Study Program
 - Seminar
 - Tutorial
 - Workshop
 - Other
 - (Blank)
- > **State**
- > **Country**

Using a blank document you can customize headings and filter within the needed activities

Filter Group by

Year

- Term and Year
- Year
- Course Prefix
- Lower Division or Upper Division
- Course Level
- Degree Program
- Delivery Mode
- New course preparation?
- New format for existing course?

Options

Save

Export For Group

Scope Department

Selection Select...

+ Add

PDF Word

Options

Options

Electrical/Computer Engr

Accounting

Boylan, Daniel H (boyland)

Hanke, Steven A (hankes)

Minke, Susan D (minke)

Minnich, John J (minnichj)

Novak, Bruce K (novakb)

Papiernik, Janet C (papiernj)

Pollock, Kathy S (pollockk)

Slaubaugh, Michael D (slaubau)

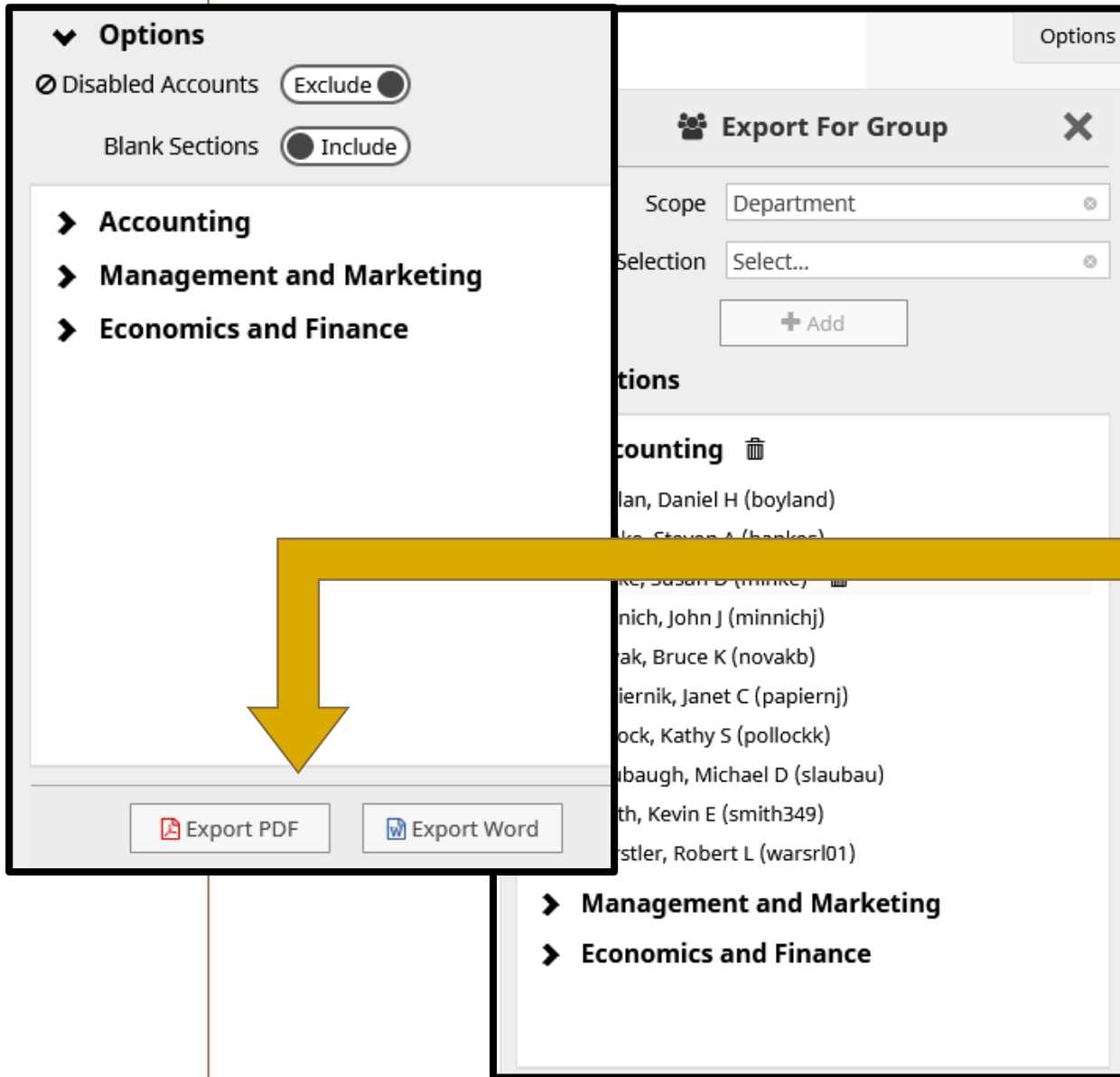
Smith, Kevin E (smith349)

Warstler, Robert L (warsrl01)

Management and Marketing

Using the Options tab (top right) when creating a report you can:

- Share
- Format Text
- Filter by date and sections
- ****Group****
- Export (PDF or Word Doc.)



Being able to create groups is extremely helpful when creating and distributing a report

Set the **Scope** and make a **Selection** that best fits the information you are trying to pull from the system

Data can be exported as either a PDF or WORD doc.

Click the 'Save' button to lock the *Export For Group* areas

Reports can be updated at anytime

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

Name	Created By ▾	Actions
Courses and Development	Me	▼ Delete Duplicate Rename ▼
Doermer School of Business - Productivity Report	Me	
DSB- Lecturer Reappointment Report Template	Me	
ETCS Annual Faculty Review	Me	

Only the report creator can choose to Delete, Duplicate, or Rename the items they create

???

QUESTIONS

Please contact your Purdue Fort Wayne campus administrator:

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Ext. 1-0797

Dutrieul@pfw.edu