Faculty Success

Faculty User Guide

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Purpose

Faculty Success is a faculty data management system that will facilitate an integrated faculty data collection and reporting process at DU. *Faculty Success* is a vehicle to collect and store faculty data regarding numerous activities including research and publications, professional development, internal and external service, course load, and student course evaluations. This system allows faculty to store artifacts of their work, for example, full-text files of publications, PowerPoint presentations, grant award letters, and audio and video recordings of performances.

By uploading faculty vita data into *Faculty Success*, DU has the capacity to produce activity reports for the purposes of annual departmental and University-wide review and celebrations of faculty accomplishments. Specifically, the system is used for annual reviews, sabbatical applications, promotion and tenure applications, and web profiles. Data is easily accessed for reviews, accreditation requirements, and reports to internal or external constituents.

The system's reporting feature also allows for the creation of customized reports to meet various needs as well as the capacity to produce a Curriculum Vitae from data entered into the system.

To view a tutorial of the system from *Watermark,* the company that produces *Faculty Success*, please visit:

The following guide provides specific information about how the University of Denver is utilizing *Faculty Success* and provides instructions for entering data. If at any point you have questions, please contact Katie Schroeder or Allee Burke at institutionalresearch@du.edu.

Getting Started with *Faculty Success*

The University of Denver began using *Faculty Success* to collect faculty information in December of 2011. Each year, faculty members should enter at least one year's worth of activity data into the system (March 31st – April 1st), although we encourage faculty to enter their entire CV. Because *Faculty Success* is used to create the recognition booklet for the annual Faculty Celebration of Research, Scholarship and Creative Work in the spring, it is crucial that all information eligible for inclusion in the booklet is added to *Faculty Success* by April. Additionally, Faculty Success is used for annual reporting, so all information for annual reports should be entered by April 1st for the previous academic year. March 31st – April 1st is the time frame for annual reviews now across all units.

Faculty Success will be a repository for all DU faculty data about teaching, research, and scholarship activities and will be used to populate University websites. The system allows for the creation of a CV for individual use as well as institutional reporting.

Some information will be imported directly into faculty members' *Faculty Success* accounts from DU databases, including contact information, rank and series history, and scheduled teaching. This data will be updated on a nightly basis. Please contact institutionalresearch@du.edu to report missing or erroneous data in the information that has been imported into *Faculty Success.*

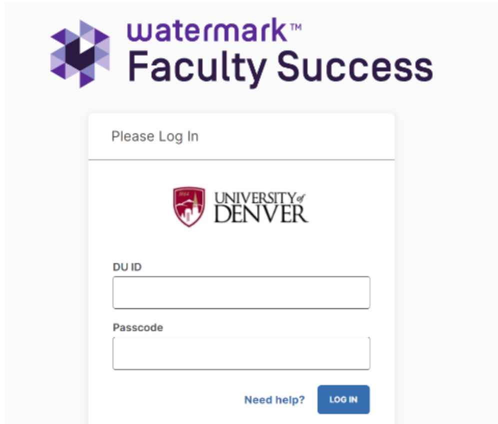
Once all CV data are entered into *Faculty Success*, we recommend that all faculty members review and update data in *Faculty Success* at least once a quarter to ensure data remains up to date.

Preparing to Enter Data into *Faculty Success*

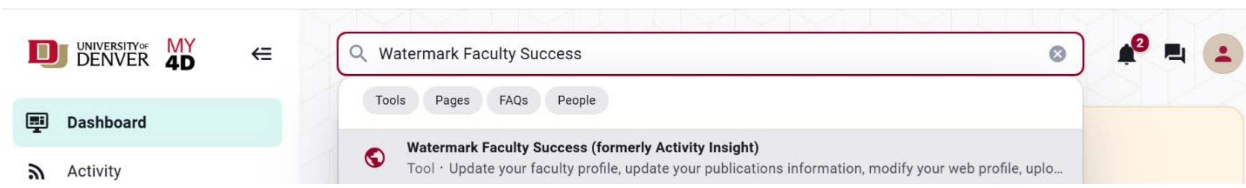
Below are a few key pieces of information to know before using *Faculty Success:*

- It is possible to copy and paste information from a CV directly into *Faculty Success* to avoid re-typing information.
- Because all necessary punctuation and formatting to create a citation is added by the system when reports are created, do not add quotation marks around titles in *Faculty Success* fields. This will result in two sets of quotes in the final report.
- There is no spell check feature within *Faculty Success*.
- Please enter all the information required for the annual faculty reports developed by your unit. Eventually, *Faculty Success* may also be used to populate DU websites, so faculty members may choose to include additional information pertinent to prospective students and faculty colleagues related to research, scholarship, service, and teaching activities.
- A field marked with a red R (R) indicates that it is "read only" and will be populated by data imported nightly into the system from DU databases.
- A field marked with a red *(*) indicates that it is a required field, and the record will only be saved if this field is completed.

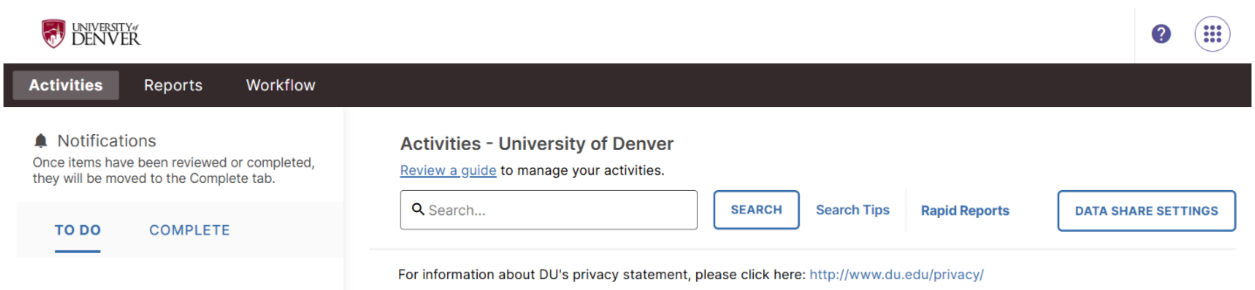
Log-In Instructions



1. Log in to [My4D](My4D).
2. Search for "Watermark Faculty Success" in the search bar



3. Click on the tool and you will automatically be logged in.
4. Click on Activities to manage your activities.



Working in *Faculty Success*

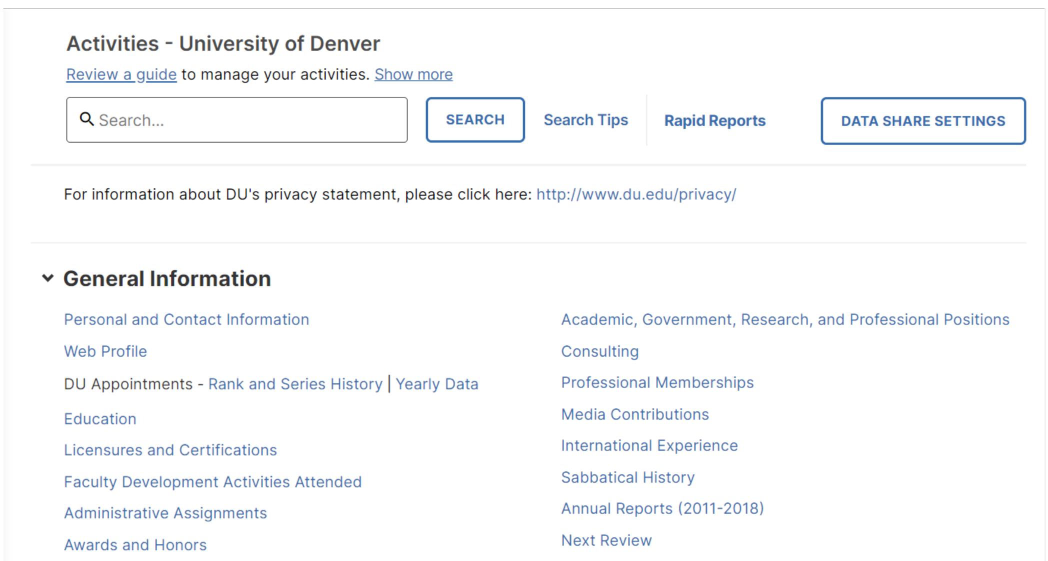
Activities Overview:

When you log in, the navigation bar displays Activities, Reports, and Tools. (You may have other options based on your security access in the workflow.)

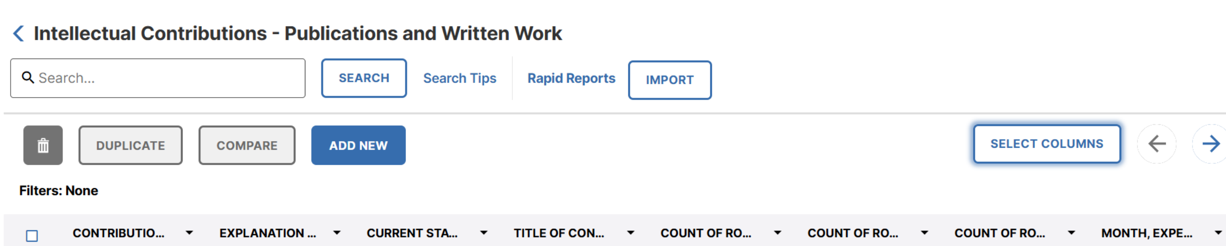
- **Activities**: Add or update information about the activities you accomplish.
- **Reports**: Run reports that have been custom-built for your unit or create your own reports.
- **Workflow**: See current tasks in your inbox and completed tasks in your history.

Activities

The Activities Screen (see below) is organized into categories: General Information, Teaching, Scholarship/Research, and Service. When you first visit Activities, spend a few minutes looking through the screens to become familiar with each section and the information stored on it.



To access a screen, click its name and the summary screen displays records that are stored for that screen. Faculty are expected to add or update information about the activities they accomplish.



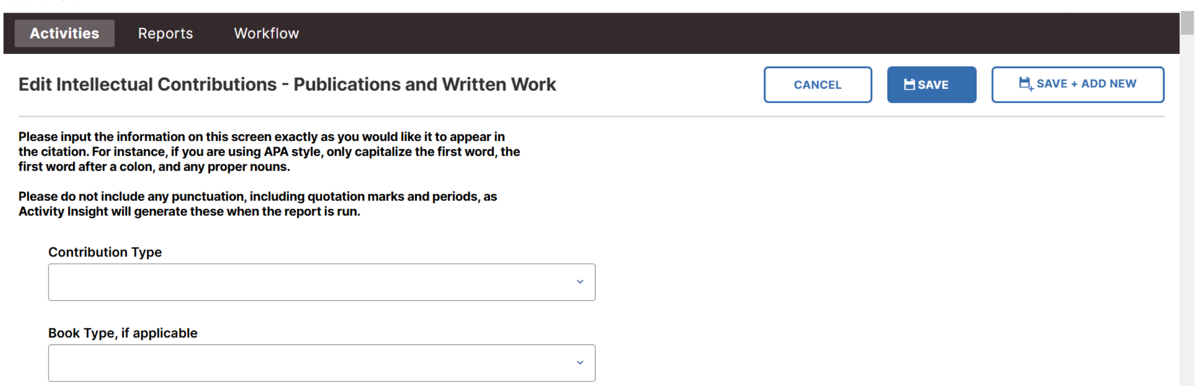
There are six possible actions you can take from the resulting screen (see example above), although not all of these actions will always be available:

- To **add** a new record, select the **"Add New"** button.
- To **import** items in bulk, select the **"Import"** button (available only for the Publications screen).
- To **copy** an existing record, check the box to the left of the item and select the **"Duplicate"** button. The system will create a duplicate record that you must then save in order to keep the copy.
- To **delete** a record, select the appropriate check box, and then select the button (you can't delete entries which have been imported for you from another system).
- To **search** for an existing record, use the search bar and select **"Search".**
- To change the way the front page of a screen looks, select **"Select Columns"** and check or uncheck certain columns.

Important Note: Read-only records that you can view but not edit or delete have been added to the system. If records need revision, please email institutionalresearch@du.edu.

Adding an Item

To add any activity, entry, services or record to a screen select the **"Add New"** button near the top of the screen. From there you will be navigated to the associated screen (see below) to complete the fields. You are encouraged to complete as many fields as possible that relate to the entry being added.



Important Note: When adding an item, make sure you enter the date associated with the entry. The date field is extremely important as most of the reports in the system are pulled based on dates.

Saving Records

When adding an activity, it is important to retain any entries/revisions by saving your work. To preserve any work, select the **"Save"** or **"Save + Add Another"** button at the top of the screen. If you try to exit from a screen containing unsaved changes, a warning message will display to determine whether you would like to return to the screen and save your modifications before proceeding.

Duplicating an Item
In some cases, it may be helpful to duplicate an item and modify it instead of manually entering the information again. On the summary page, click on the checkmark box for the item you want to duplicate and click on the **"Duplicate"** button. It will copy the entry you selected and allow you to make edits where necessary then save the record.

Removing an Item
To remove or delete an item from your list click on the checkmark box for the item you wish to delete and then click on the **"trash can"** button.

Important Note: Once an item is removed from the system it can't be retrieved. In instances where data has been imported from other systems on your behalf you will not have the option to remove an item.

**The following pages detail each of the sections and screens within *Faculty Success* and the types of information included on each screen. Your home unit may have included additional customizations, such as supplementary screens or changes within individual screens, which are not documented in this guide. Please contact your divisional representative with questions.

General Information

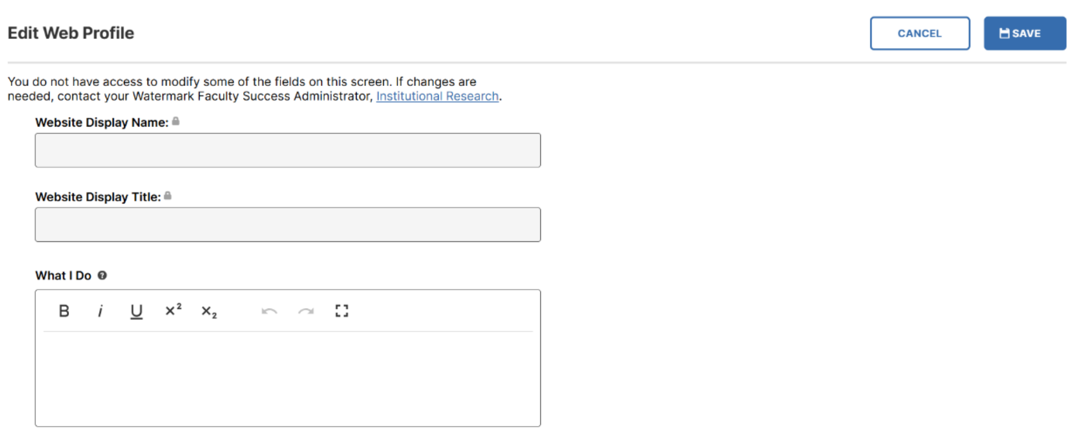
Personal and Contact Information

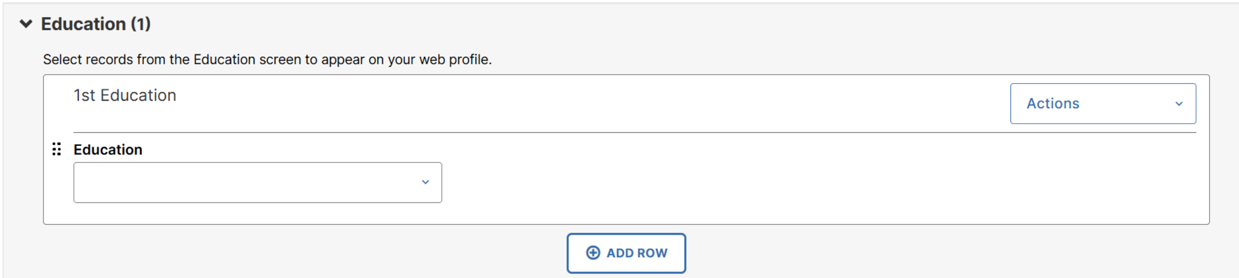
This screen contains demographic information. DU has imported information into the following fields:

- First Name
- Middle Name
- Last Name
- Email Address
- Office Address
- Office Phone Number

This page also includes a brief biography and teaching and research interests. Faculty may complete fields for which information has not been imported.

Web Profile





The web profile screen allows you to make edits to your profile. Contact your Marketing team to update pictures and titles. Please note that many of the fields on the web profile (ex: Education) need to be filled out separately in the specific section outside of the web profile screen first before it appears on the drop down under web profile.

DU Appointments- Rank and Series History

This screen details faculty rank and series history while at the University of Denver. All information on this screen will be imported from Banner and periodically updated. Please verify the accuracy of this information.

DU Appointments- Yearly Data

This screen lists appointment data beginning with the 2011-2012 academic year. This page also includes primary academic unit and department, if applicable. Here, faculty may indicate affiliations with other units on campus, for example for overload teaching positions. This screen also indicates if a faculty member is on leave for a specific term. All information on this screen will be imported from Banner. Please check this information for accuracy.

Education

Please enter educational history on this screen. Each degree obtained and institution attended will require a separate record.

Licensures and Certifications

Please list any licenses or certificates earned on this screen.

Faculty Development Activities Attended

Please indicate workshops, conferences, programs, or other faculty development activities attended. This will include faculty development activities on campus and outside of DU.

Administrative Assignments

Please add a new record for any administrative assignments held at DU or at other institutions (department/unit chair, program director, dean, etc).

Awards and Honors

Please list any awards or honors received.

Academic, Government, Military and Professional Positions

Please enter all relevant work experience.

Consulting

Please list any type of consulting in which you have been involved.

Professional Memberships

Please list professional memberships here. Note that *leadership positions* in a professional organization are collected on the Professional Service screen.

Media Contributions

Please list any media contributions (TV, radio, newspaper, etc.).

International Experience

This screen collects information on languages spoken, countries in which faculty have expertise, involvement teaching abroad, and additional experience including international collaborations, research, teaching, and service.

Annual Reports

This is now a locked screen and was used to generate Annual Reports from 2011-2018. You can access old annual reports here but can also contact institutionalresearch@du.edu for annual reviews.

Teaching

Scheduled Teaching

The majority of information on this screen will be imported at the end of each quarter, after grades have been submitted and results of course evaluations have been released. Course Evaluation results will then be automatically imported on this screen. Faculty may comment on any innovations, including new teaching material or technological enhancements, developed for the course. Please also indicate whether there was a community-engaged/service learning component to the course. Syllabi may be uploaded to this screen.

Directed Student Learning (e.g., theses, dissertations)

Please indicate work with individual students, such as dissertation or thesis committees, capstone advising, and independent study, honors thesis, or student research supervision.

Non-Credit Instruction Taught

Please include workshops, seminars, guest lecturers, and other not for credit teaching activities.

Academic Advising

Please provide information about yearly academic advising activities.
Courses Taught at Other Institutions

Please provide information about any courses taught at other institutions.

New Course Development

Please provide information about any new courses in development.

Scholarship/Research

Please indicate whether each activity listed under the three Intellectual Contributions categories is a result of external or internal funding. Additionally, please ensure that the first two categories of Intellectual Contributions are up to date for the dates April 1st through March 31st, as they will be used to compile the Faculty Recognition Booklet for the Scholarship, Research, and Creative Work Celebration.

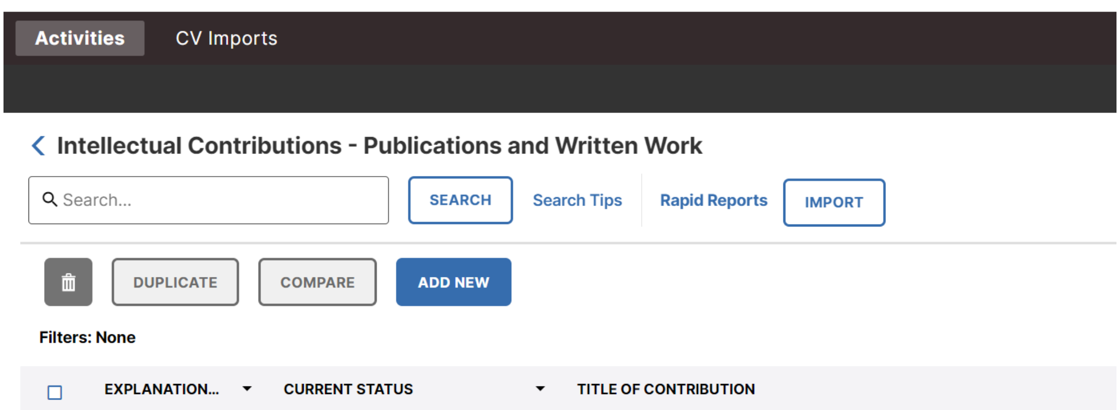
Intellectual Contributions- Publications and Written Work

Information about all published works (including books, book reviews, book chapters, journal articles, short stories, etc.) should be included here.

If you use a reference manager, such as RefWorks, Mendelay, Zotero, Google Scholar, Papers or Endnote you may import citations from your publications or written work through a bibtex file. To learn more about bibtex, please visit http://www.bibtex.org/.

Once you have generated a bibtex file, you may import the data on that file into Faculty Success using the "**import items**" button (Figure 5).

Figure 5: Intellectual Contributions – Publications and Written Work



If you have an ORCID ID, you can import publications directly into Faculty Success. For directions on how to do so, please see: https://www.digitalmeasures.com/activity-insight/docs/orcid.html

Intellectual Contributions- Artistic Performances and Exhibits

Works of art, dance, drama, digital media, film, music, and theater are listed here. Supporting files may be uploaded to this screen.

Intellectual Contributions- Presentations

Please include professional presentations on this screen.

Sponsored Research Proposals: External Contracts and Grants

This information will be imported directly from the Office of Research and Sponsored Programs. Please review it for accuracy.

Sponsored Research Awards: External Contracts and Grants

This information will be imported directly from the Office of Research and Sponsored Programs. Please review it for accuracy.

DU Sponsored Research, Scholarship, and Creative Work

Please enter internal funding received from the University of Denver to support Research, Scholarship and Creative Work on this screen.

Other Sponsored Activities (non-DU and not through ORSP)

Please include information about external funding received that did not go through the Office of Research and Sponsored Programs nor was funded directly by DU. For example, funding processed through University Advancement could be included on this screen.

Intellectual Property (e.g. patents)

This screen collects information on intellectual property and will be imported from information provided by the Office of Technology Transfer. Please check this information for accuracy and update as needed.

Research Currently in Progress

This screen includes projects or research on which faculty members are currently working.

Course Release for Research

Please indicate receipt of teaching course release for the purposes of working on research.

Service

Department/Program

Please enter service to a DU department or program here.

College/Academic Unit

This screen collects service to a college, division or academic unit.

University

Service to the University is broader than that at the departmental or divisional level, and includes, for example, serving on University-wide task forces or as a faculty senate representative.

Professional

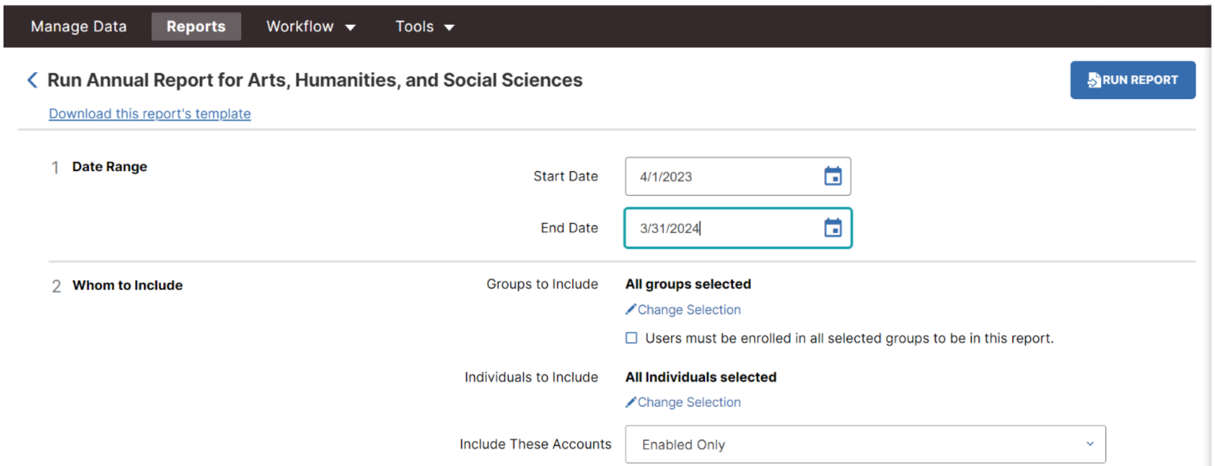
Please indicate service to your profession. Examples include serving as a board member, in a leadership position, or as a committee member in a professional organization.

Public/Community

Please enter public or community service on this screen.

Running Reports

Faculty have the ability to produce a number of pre-built reports based on the information entered into Watermark Faculty Success. Faculty can create a CV, discipline-specific reports, and potentially other reports depending on what Schools/Colleges you are in and your security role in the system. To run one of the pre-built reports, click on **"Reports"** in the header and select a report from the list. By default, faculty are able to run the **"Annual Report for {college}"** and their **"Vita"**. After selecting the report, you would like to run, a box with list of steps will be displayed.



Follow the steps entering in the information for each step:

- Select the **Date Range** to use.
- Select **Whom to Include** depending on your access.
- Select **Report Options** to change the citation style.
- Select the **File Format** using the drop-down menu box. Your choices are a Word file, PDF file or an HTML file.
- Once you have entered in the requested information in the report steps click on **Run Report**.

Important Note: Most of the reports are date defined which means it is very important for any activity you enter in the system to have at least a year associated with it.
In addition to the pre-built reports you can run a custom report by clicking the **"Create a New Report"** button at the top of the Reports page.

There are two options for custom reports.
1. Blank Document
2. Vita

For detailed instructions on creating a custom Vita use the Customize Your CV Guide.

Important Note: If you feel data is missing from your report, sometimes it is helpful to see how the report is built and what screens/fields are pulling into the report. You may download a report's logic template showing how the report you selected is built by selecting "Download this report's template".

There are two types of reports that may be run from *Faculty Success*, **standard reports** and **create a new report**.

Run Reports

The listed reports are reports already developed by *Faculty Success* or the University of Denver. Examples include an Annual Report, complete Curriculum Vita, or individual components such as academic degrees earned, a list of presentations, or scheduled teaching. Custom reports are run based on a selected date range and can be presented as Word Documents, PDFs, or html.

To run a report, click "Run Reports," located in the top left corner of the main *Faculty Success* screen. Using the drop down menu, select a report from under the title "Activities Database-University" in grey. From here, select the type of report desired, the date range, the format, and the page size. Department or college administrators will also be asked to select which faculty members to include in the report.

Developing a new customized standard report

Please work with Katie Schroeder (kathryn.schroeder@du.edu) to build new custom reports in *Faculty Success.*

Create a new report

The "Create a new report" option, allows users to selects the type of data that they would like to include in the report. These data can come from multiple screens within *Faculty Success* and are typically used for college or university-wide data pulls. Examples of these reports include professional service completed by faculty members of a particular academic unit or external research funding attained in a given year. Ad hoc reports are very flexible and allow the user to report on all data included in *Faculty Success*. Like custom reports, ad hoc reports are run based on a selected date range. They can be presented as Word Documents, PDFs, Excel files, or html.

To run this ad hoc report, click "Run Reports" in the top left corner of the screen. From here, select the link that says "Create a new report" at the bottom of the drop down menu. Then, select data for the report, the date range, the format, how the data should be organized, and the page size. Department or college administrators will also be asked to select which faculty members to include in the report

Next Steps

Now that you have an understanding of the screens and functionality of the University of Denver's *Faculty Success* database, please take some time to enter your data into the program. Do not hesitate to contact Katie Schroeder at institutionalresearch@du.edu the University's *Faculty Success* administrator, with any questions or concerns as you work through the system. With your assistance, *Faculty Success* will greatly enhance the University's capacity to collect and report on the accomplishments of our faculty members. Thank you.