PURDUE UNIVERSITY

FORT WAYNE

Purdue University Fort Wayne

Faculty Success

Faculty Resource Guide

Introduction

Faculty Success (FS) is a customizable online information management system designed to organize and report on your research/creative activities, teaching, and service accomplishments. FS is a comprehensive and versatile reporting tool used to generate faculty activity reports to meet accreditation requirements. Faculty can also generate up-to-date customizable CVs.

Benefits to Users

Faculty Success eliminates periodic, recurring requests for information on your activities and accomplishments. Faculty can also generate up-to-date CVs as well as annual reports. The web-based interface makes data collection and reporting easy and intuitive.

Logging In to Faculty Success

To log in to the secure DM application, navigate to the OIR website located [here](). You will use your Purdue Fort Wayne username and password as the login information.

Note: If you receive a message stating you are not authorized to access the system, submit an online request using the OIR's service request form located [here]().

User Authorization

FS offers secure, permission-based roles and access. Administrators (Deans, Department Chairs) and Administrative Assistants have access to different features, which allow for modifying user records in bulk. If you need access to these features, submit an online request using the OIR's service request form located [here]().
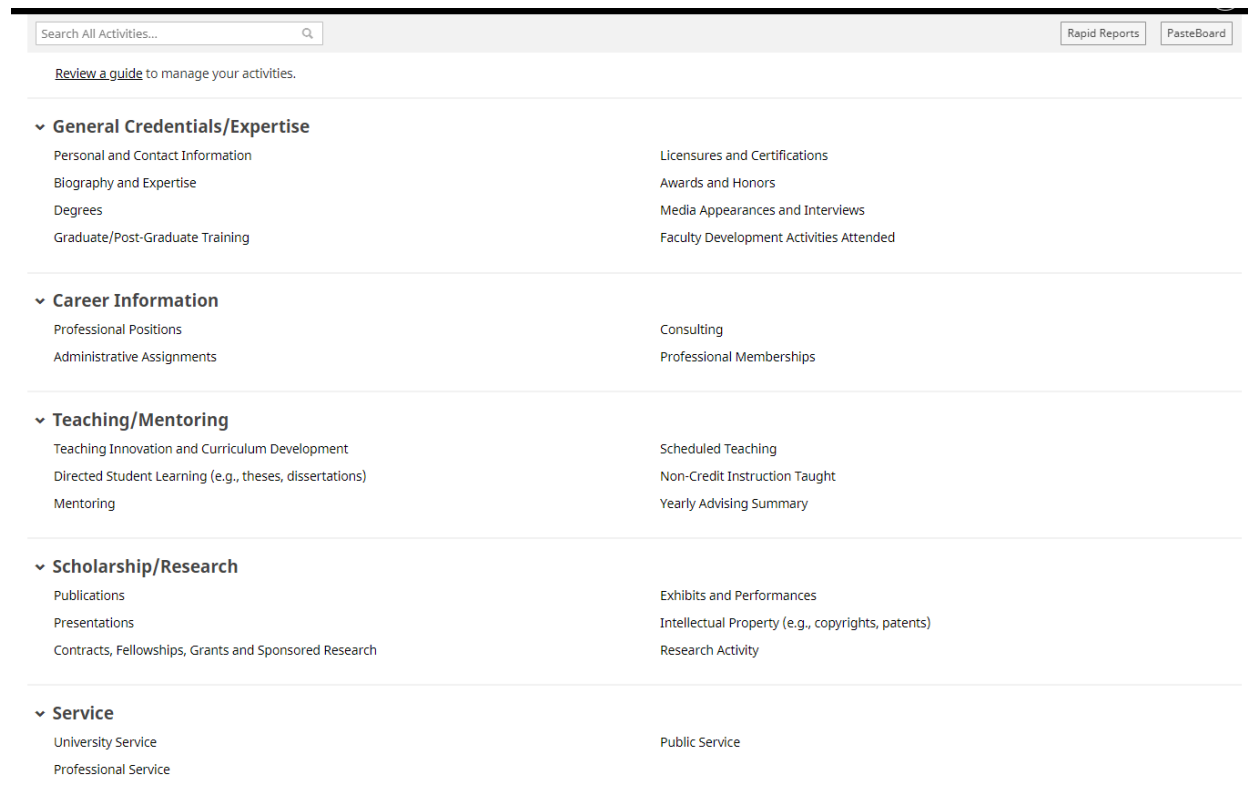
Faculty Success Overview

Faculty Success is made of many different components, all of which share common basic elements:

1. The top Navigation Menu
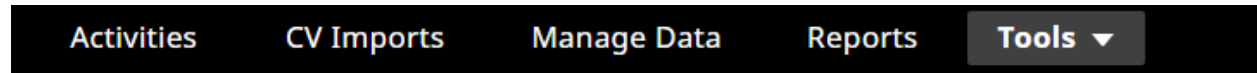
2. Main content area organized into categories: General credentials/expertise, career information, teaching/mentoring, scholarship/research, and service.

Navigation Menu

The navigation menu is a permanent fixture at the top of all Faculty Success screens. The main buttons/links provide the following functionality described briefly below. A more detailed guide is available to download here.

- **Home:** Find your Client Success Manager's contact information, access resources and technical information.
- **Manage Activities / Manage Data**: Enter or manage your own biographical information, teaching, research/creative activity, and service activities. Enter or manage other users' teaching, research, and service activities.

- **Reports**: Utilize the full reporting module to run customized reports, or create new reports, generated from the data in Faculty Success.
- **CV Imports:**
  - Transfer Data from an existing CV into Faculty Success quickly and accurately.
- **Help**:
  - **Contact us**: You may send a support request using the sub-menu option. These requests are sent to the AI support queue and the system administrator will be in touch shortly. By default, your contact information is populated based on your Purdue FW login. Please do not change this option to anonymous.
  - **Resource Center**: Access documentation created by Faculty Success
- **Tools:**
  - **Rapid Reports Tool**: generate a CV, bio-sketches, or Annual Report in Word, PDF, or HTML formats using start and end dates.
  - **PasteBoard tool**: bring in text from word processing application (MS Word) and standardize for pasting into Faculty Success.

Based on your secure, permissions-based role you might not have all utilities displayed or functionality described here.

CV Imports

The new CV Imports function allows for administrators, faculty, or faculty delegates to quickly and accurately enter information from a faculty CV. This process converts portions of a faculty CV into records on the **Activities** page.
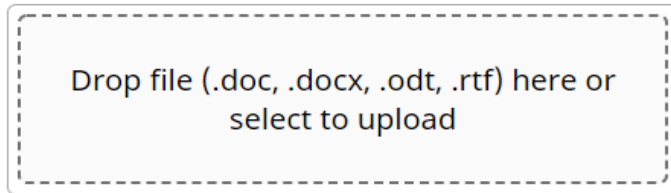
Upload New CV

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

Select the **Activity Type** for which you would like to create, update, or modify.

Once the **Activity Type** is selected, a dialogue box will appear with instructions on how to highlight the appropriate text. **Please Note:** During the initial system configuration process, certain fields were set to either required or recommend. Required fields need to be completed prior to progressing. If you believe a certain field should not be required for a specific **Activity Type**, you may submit a request for this to be reviewed.

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 Edcuation," 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

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

Faculty Success will then ask you to confirm the selected entries. Once confirmed, the system will prompt you to select the appropriate information by simply highlighting the text. Certain fields require manual entry, and a system window will open with blank entry fields.

Entry 2

████████████████████████████, Illinois Association for Institutional Research Annual Forum, "Identifying and Nurturing Future Institutional Research Professionals: Building Our Future," Illinois Association for Institutional Research, University of Illinois Urbana-Champaign, Urbana, IL, United States. (2010).

City

State

▼

Country

▼

UPDATE ENTRIES

Once all required information is complete, the system will prompt you to review and import the new records.

If you're finished creating records, move on to the final step.

REVIEW AND IMPORT 2 RECORDS

▼

If you experience any issues, a Faculty Success resource video is located here.

Manage Activities

The manage activities module allows faculty to capture and manage teaching, research/creative activities, and service accomplishments.

The first line of text at the top of the manage activities page – Review a guide to manage your activities – provides a universal Faculty Guide that is maintained by the vendor, Faculty Success. Most of that material is included and customized in this document. The manage activities page includes links to each of the data collection screens in the system.

When you first visit this screen, it would be good to spend a few minutes looking through the screens accessible from it. To access an activity, click its name. The resulting screen displays records that are stored for that screen.
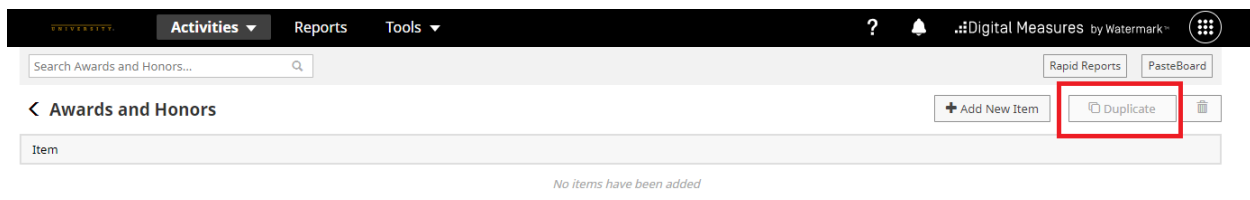
Adding an Item

Items represent any activity, entry, service, or record that is added to one of the various sections within Faculty Success. For example, when you enter the "Awards and Honors" section under General Information, there will be an **Add New Item** button near the top of the screen. Click on this button to add an award or honor.
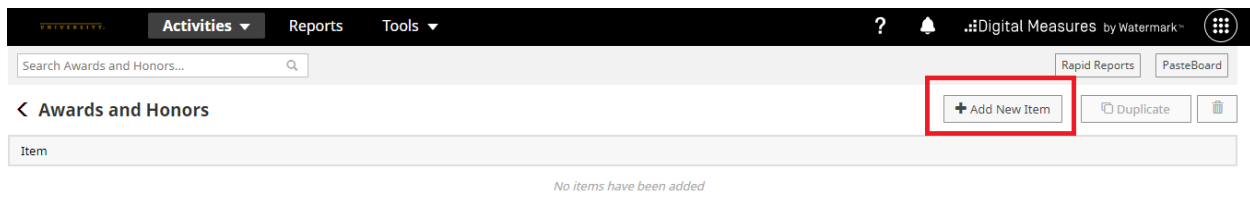
After completing all the fields, remember to click the **Save** button. When adding an item, the only required field is date. For date, you must enter, at a minimum, a year in order to save the item. The format for Faculty Success is [Month Name] DD, YYYY.

Duplicating an Item

In some cases where there are two items that are almost identical, you may find it necessary to duplicate one and then slightly modify it. You can do this when viewing the items for a particular section. First, click on the checkmark box for the item you wish to duplicate, then click on the **Duplicate** button.

Removing an Item

Click on the checkmark box for the item you wish to remove, and then click on the **Trash Can** button.

Search Awards and Honors...

< **Awards and Honors**
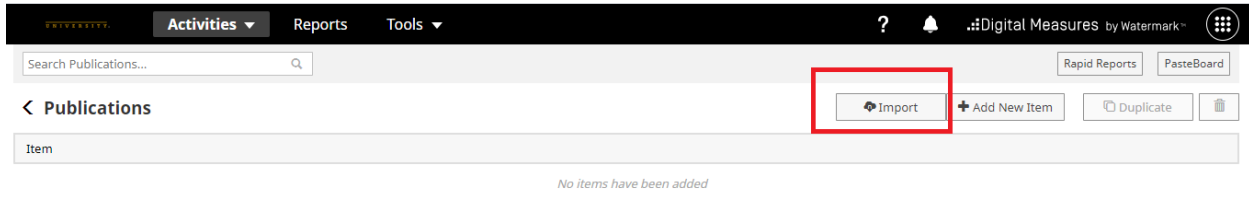
+ Add New Item   **Duplicate**   🗑

Item

No items have been added

Publications

Importing Items

Faculty can use the import feature to bring Publication data into their profile. Import is only available for the "Publications" section.


There are two ways import citations from other databases:

Import from a Bibtex file

You can load BibTex files into Faculty Success. The Publications screen allows you import citations from a wide variety of reference managers or databases. First, you need to download the citation file (.txt/BibTex format) from the source (e.g., Google Scholar, Refworks, Web of Science, Zotero) to your computer. Then, access the Publications screen to import/load the BibTex citation file into your DM profile.

1. Download the citation (.txt file format) to your computer from the reference manager or other databases.
2. Click on the Publications link.
3. Click on the Import Items as seen in screenshot above.
4. Under the Import from BibTex file head, click on the **Choose file…** button to select a BibTex file to upload from your computer.
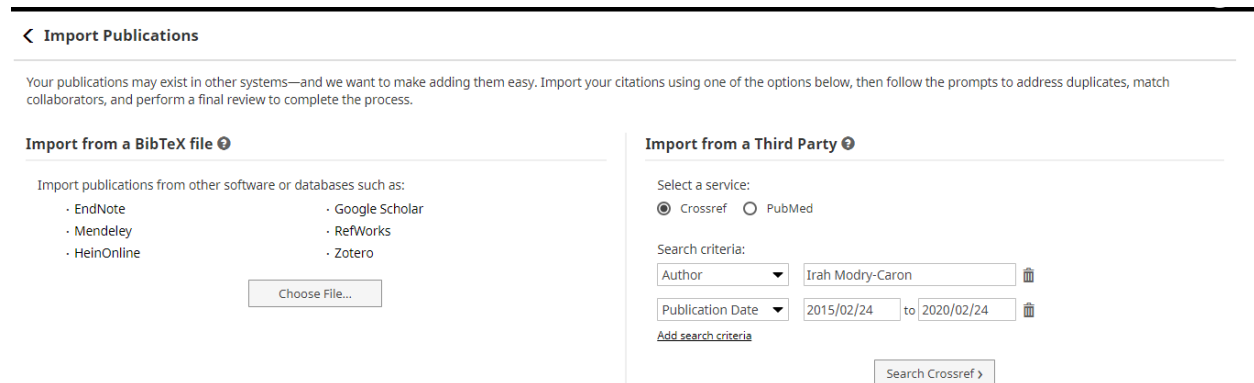
5. Click on the **Continue** button.
6. The next screen will prompt you to match the publication with other Purdue Fort Wayne accounts. We recommend that you skip over this section and do not match user accounts. Click

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.

7. Review your item(s) to be imported and click on the **Finish Import** button to complete importing the items.

Import from Third Party

You can also import publications directly into Faculty Success from a third party, such as PubMed or Crossref. You can connect to third party publication databases within Faculty Success and search for your citations, or those of the user for whom you are managing data.

1. Click on the Publications link.
2. Click on the Import from Third Party section, select the third party source from the service drop-down menu. Note that the search criteria will dynamically change based on which service you use.

3. Use multiple criteria to search for your publication.
   a. **Crossref Search**: The default search, without adding any other criteria, is based on publication date and author (full name). To add criteria, click on the Add Search Criteria link, use the dropdown menu to specify new search criteria and enter search text (e.g. search on ORCID ID).
   b. **PubMed Search**: The default search, without adding any other criteria, is based on your last name and first initial. To add criteria, click on the add search criteria link, use the dropdown menu to specify new search criteria and enter search text.
4. Then, click on the **Search** button.
5. Once the search has finished and the results appear, click on the checkmark box for the publications you wish to import. Then, click **Continue**.
6. 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.
7. Review your item(s) to be imported and click on the **Finish Import** button to finalize the addition of the publication.

Match Collaborators

The Match Collaborators screen appears as Step 3 of the Import Publications feature. We fully recommend that you skip this step and click on the Continue button to advance to the next step. However, sometimes this **Continue** button appears inactive (greyed out), and the screen requires that you identify 'no match' to users. In order to select no match, follow the steps below ():

Fill in this section later when you have a test series publication identified.

Items Brought in from Other Sources

Another streamlined function in Faculty Success is that data can be automatically brought in from other sources. Currently, scheduled teaching and a limited set of personnel information (rank, home college and department) are imported into DM.

Adding / Updating Other Members of an Activity

Faculty can add or update other members of an activity within certain sections of Scholarship/Research category. Other members may be added / updated to activity in one of the following ways:

1. As a **Role** to Exhibits and Performances.
2. As an **Investigator** to a Contracts, Fellowships, and Grants.
3. As an **Author / Editors** to a Publication.
4. As an **Inventor** to Intellectual Property.
5. As a **Presenter / Author** to a Presentation.

To add/update another member of an activity, click on the type of Scholarship / Research. Then, click on the Add New Item or Edit Item button to drill down into the item detail.

When manually adding an activity, the first member will always be you and displays as your Purdue FW username, first name, and last name. You have option to 'override' or use a pen name by entering a different first or last name in the data field of your row.

If the Authors/Editors is collapsed, be sure to click the carrot to expand the section. (add a screenshot with a publication with multiple authors)

If there are additional authors or editors, skip down to select the number of 'Other Member' rows you wish to add and click the **+Add Row** button.

The 'Other Member' will be labeled as the '2nd' contributor/author. Their information can be inputted in one of two ways:

1. If the other member is Purdue FW faculty, then you will be able to find them in the first drop down text box by entering their user name, first name, or last name: (add screen shot below)
2. If the other member is not associated with Purdue FW or if their username is not listed in the dropdown, enter their information in the text boxes. (show screen of empty boxes).

Faculty Delegates

Faculty can assign other individuals as one-to-one delegates in DM. Individuals assigned by faculty, as one-to-one faculty delegates will have access to manage data and run reports for the faculty. To assign a delegate for your data and reports, please send request one-to-one delegate access to OIR's service request page located [here](#).

Creating Custom CVs

Faculty have the ability to generate a standard CV, known as a 'Vita' in Faculty Success, using the Reports or Rapid Reports feature. Faculty can also create customized CVs to vary from the standard vita, for personal and professional uses. Custom CVs are created using intuitive features such as drag and drop, word/format editors, and record filtering. To create a custom CV based on the default template, follow the steps below:

1. Click on the **Reports** link in the main navigation menu.

2. Click on the **Create New Report** button in the upper right hand side of the Report screen.
3. Choose the Vita option when selecting the report style to begin with the default CV template. Selecting this option is the easiest and fastest way to customize your CV.
4. Your CV will be auto-populated on the next screen based on the data entered into Faculty Success and the default CV template.
5. There is a variety of ways to customize your CV, including but not limited to those outlined below. Faculty Success has published content on how to customize your CV, including a video tutorial Links to the Faculty Success' resource are embedded below
   a. Reformatting your CV
      i. Reordering using Drag and Drop
         (00:54 – 1:04 of the video tutorial)
      ii. Adding or removing Activity Sections and headers (1:05 – 1:26 of the video tutorial)
      iii. Adding a Text-Only Section (no activity records)

   b. Filtering Data displayed in Activity Sections
      i. Click on the Settings gearwheel to filter the activities displayed in each section
      ii. Breaking out Publications
         (1:27 – 2:32 of the video tutorial)
   c. Applying a Date Range
      i. Specify certain years and dates of data that should be included on your CV.
         (2:33 – 2:45 of the video tutorial)
   d. Choose to override (not apply) date ranges to certain sections: (2:46 – 2:55 of the video tutorial)
6. Once you have finished customizing your CV, you should save it for future updating. Click on the **Save** button near the top right corner of the screen and enter a name for the new CV.
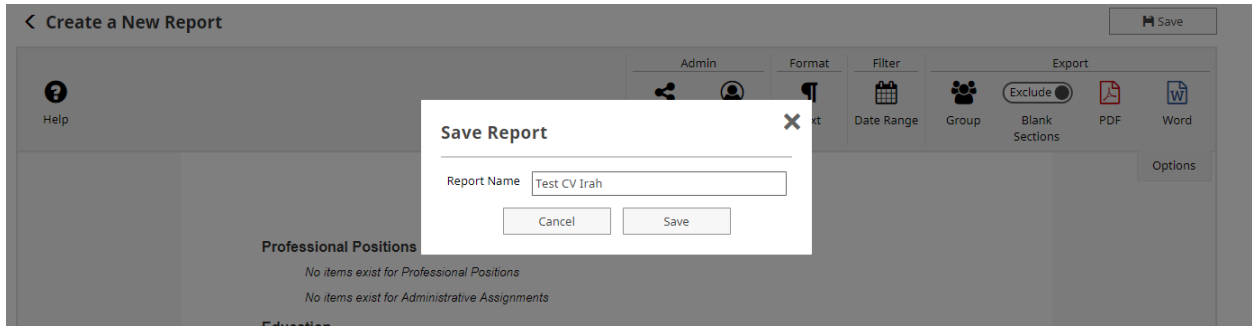
7. To download a PDF or Word document copy of your CV, click on the PDF or Word icon under Export in the top right area of the screen.
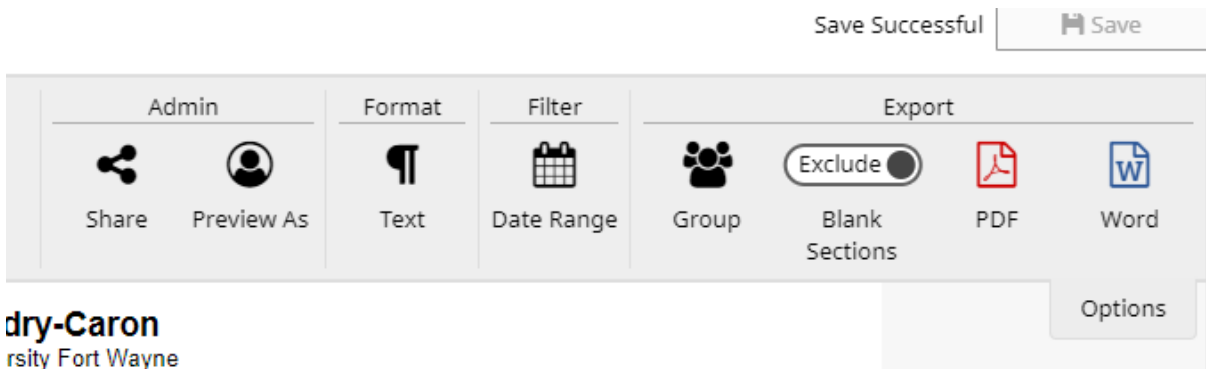
Faculty Success Video Tutorial:

https://www.digitalmeasures.com/activity-insight/docs/reporting.html

Frequently Asked Questions

- Log-in / Authorization Issues: OIR's Service Request Form

The following links will re-direct you to the Faculty Success Resource Guide (**Note:** some of the links will require you to sign-in to Faculty Success)

- Manage Activities
- Importing Items (BibTeX / Third Party)
- Report Creation
- Customizing CVs