

**SEPTEMBER 2021**

# ***HOW TO RUN AND CREATE 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**
- Faculty Degree Audits/ **Credentials**
- Faculty Publications
- **Annual Faculty Report**
- Annual Awards and Honors
- Scheduled Teaching/ **Courses Taught** (Individual/Department/College)
- Annual Service Report

# Running a Report

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

**A: You can run a VITA Report created by Watermark**

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

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

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

# Running a Report

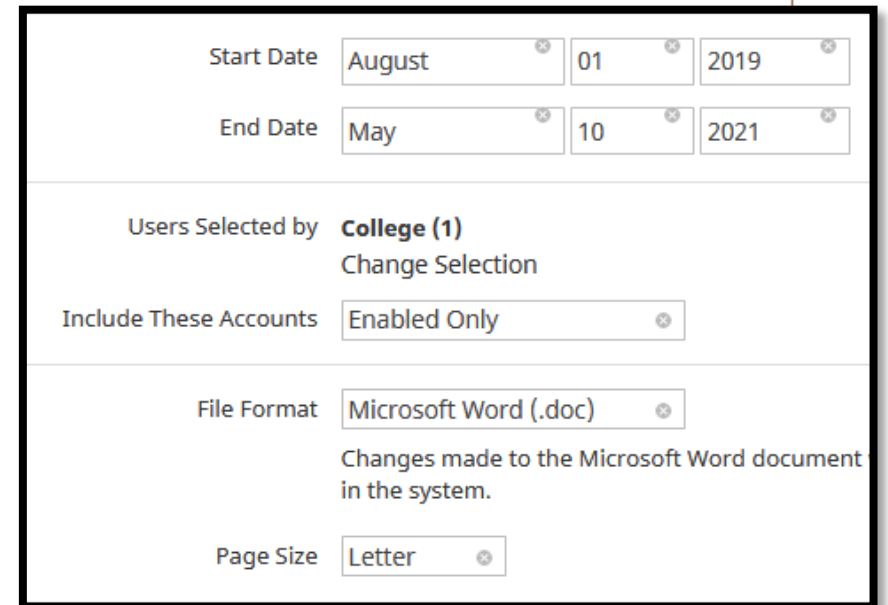
**Q: We need all department/college CVs for accreditation purposes**

**A: You can run a VITA Report created by Watermark**

▪ 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
- File Format needed - Save as Word.doc or PDF

▪ Hit Run Report

A screenshot of a web form for configuring a VITA Report. The form has a white background and a black border. It contains several sections: 1. Start Date: Three dropdown menus showing "August", "01", and "2019". 2. End Date: Three dropdown menus showing "May", "10", and "2021". 3. Users Selected by: A dropdown menu showing "College (1)" with a "Change Selection" link below it. 4. Include These Accounts: A dropdown menu showing "Enabled Only". 5. File Format: A dropdown menu showing "Microsoft Word (.doc)" with a note below it: "Changes made to the Microsoft Word document in the system." 6. Page Size: A dropdown menu showing "Letter".

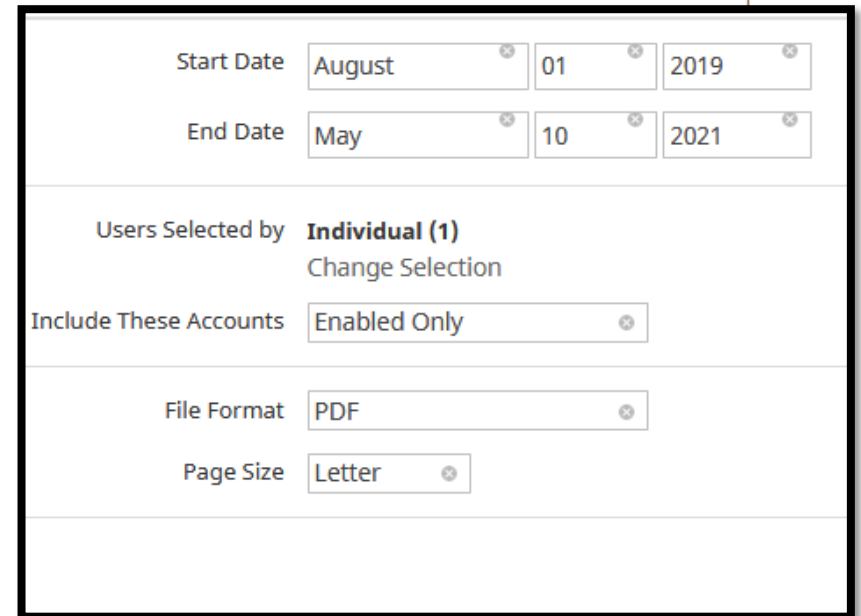
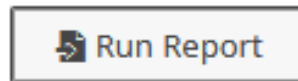
# Running a Report

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

A: You can run a **Scheduled Teaching by Faculty Report** created by Watermark

- 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 form for configuring a report. The form is divided into several sections by horizontal lines. The first section contains "Start Date" with dropdowns for "August", "01", and "2019", and "End Date" with dropdowns for "May", "10", and "2021". The second section is titled "Users Selected by" and shows "Individual (1)" with a "Change Selection" link below it. The third section is titled "Include These Accounts" and has a dropdown menu set to "Enabled Only". The fourth section is titled "File Format" and has a dropdown menu set to "PDF". The fifth section is titled "Page Size" and has a dropdown menu set to "Letter". Each dropdown menu has a small circular icon with a cross in the top right corner.

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		

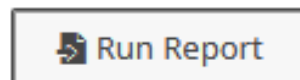
# Running a Report

**Q: We need to provide our faculty credentials**

**A: You can run a HLC Qualifications Report created by Watermark**

- 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. Underneath is "Include These Accounts" with a dropdown menu set to "Enabled Only". The next section is "File Format" with a dropdown menu set to "Microsoft Word (.doc)" and a note "Changes made to the Microsoft Word document". The final section is "Page Size" with a dropdown menu set to "Letter".

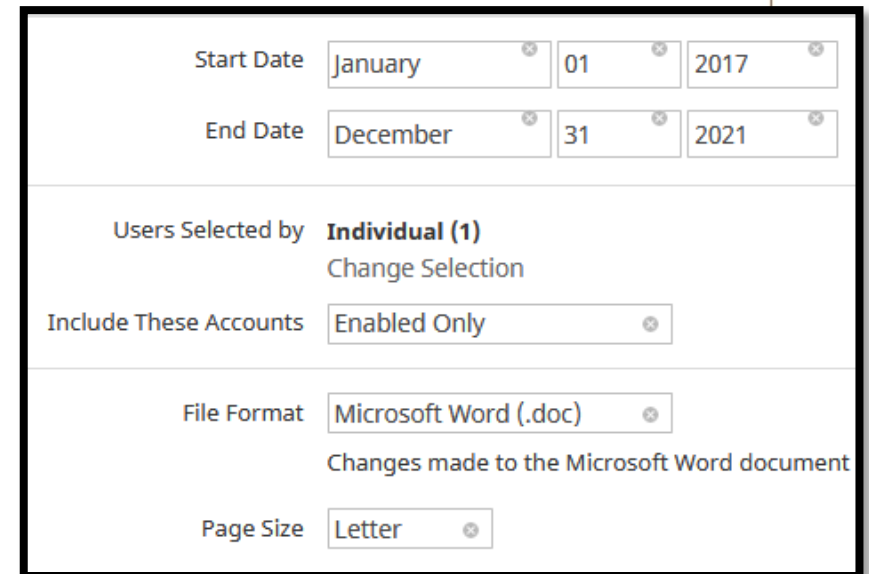
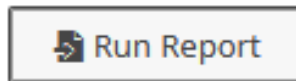
# Running a Report

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

**A: Run a *Intellectual Contributions Report by Faculty* Report created 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

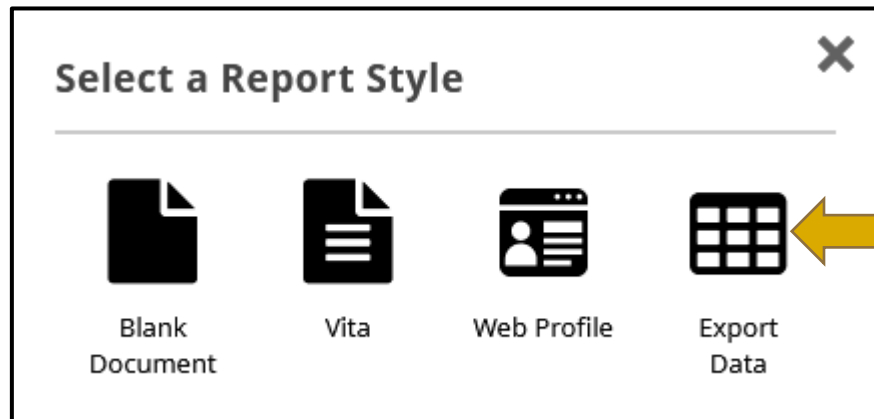
- Hit Run Report

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

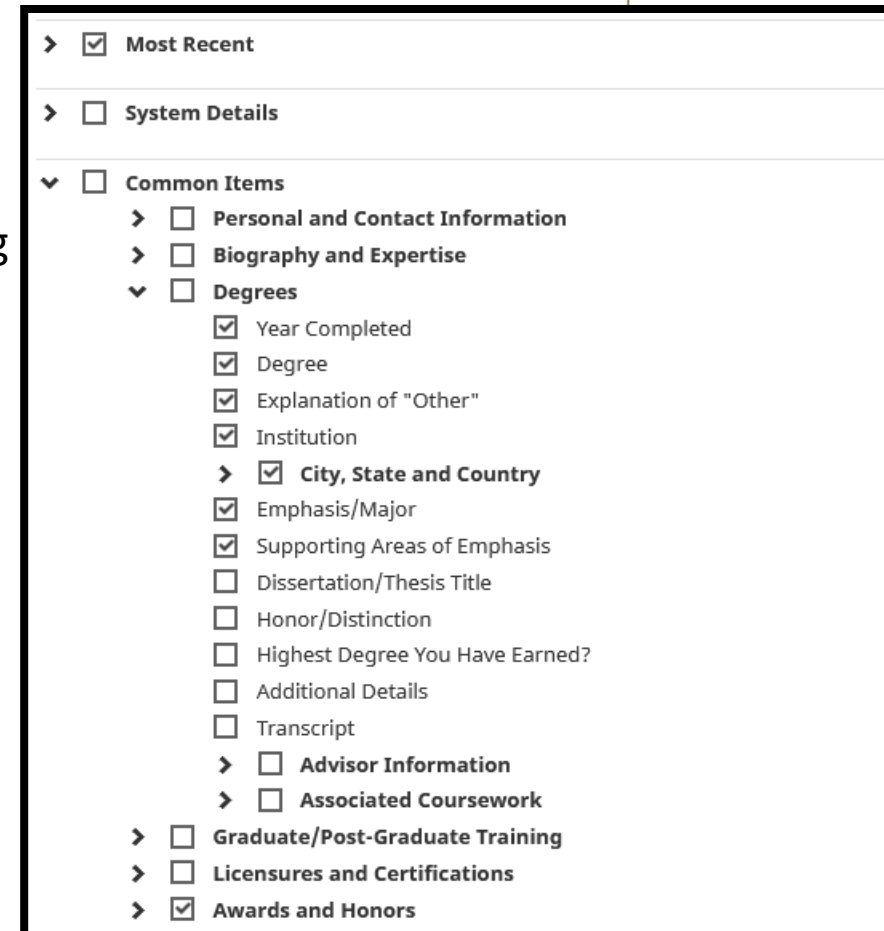
# Making your own reports

Any information that is stored in Faculty Success 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



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

+ Create a New Report

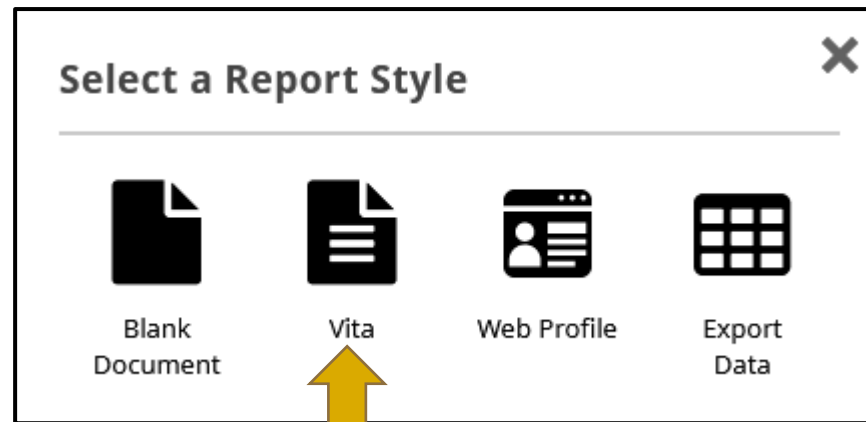




# Making your own reports

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[+ Create a New Report](#)

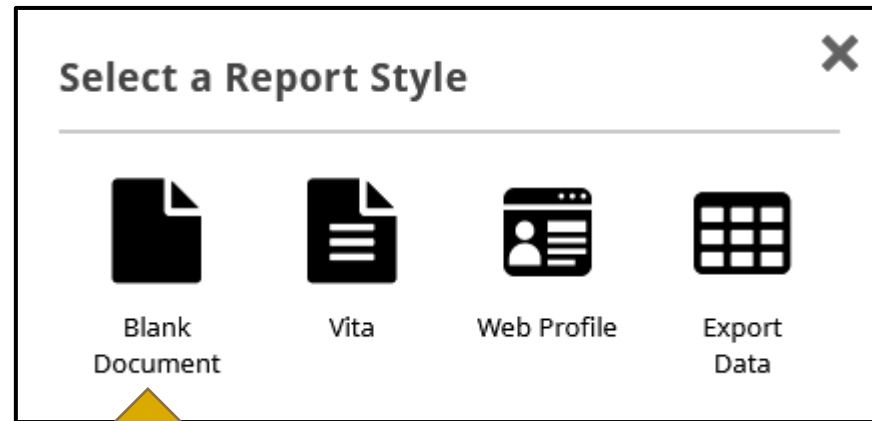


Starts as a standard system Vita document where Activities can added/edited/customized

# Making your own reports

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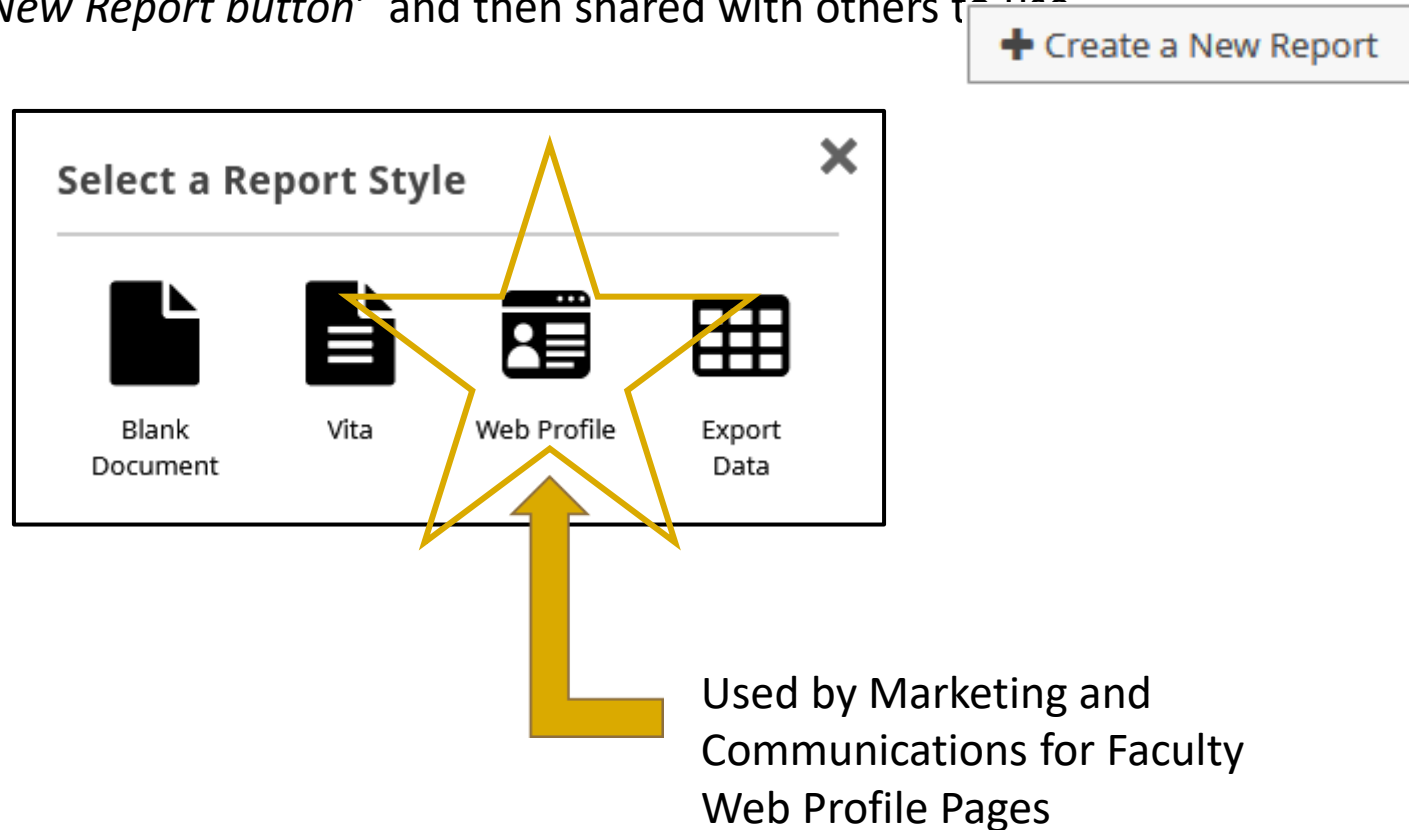
+ Create a New Report



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

# Making your own reports

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< Create a New Report

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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*

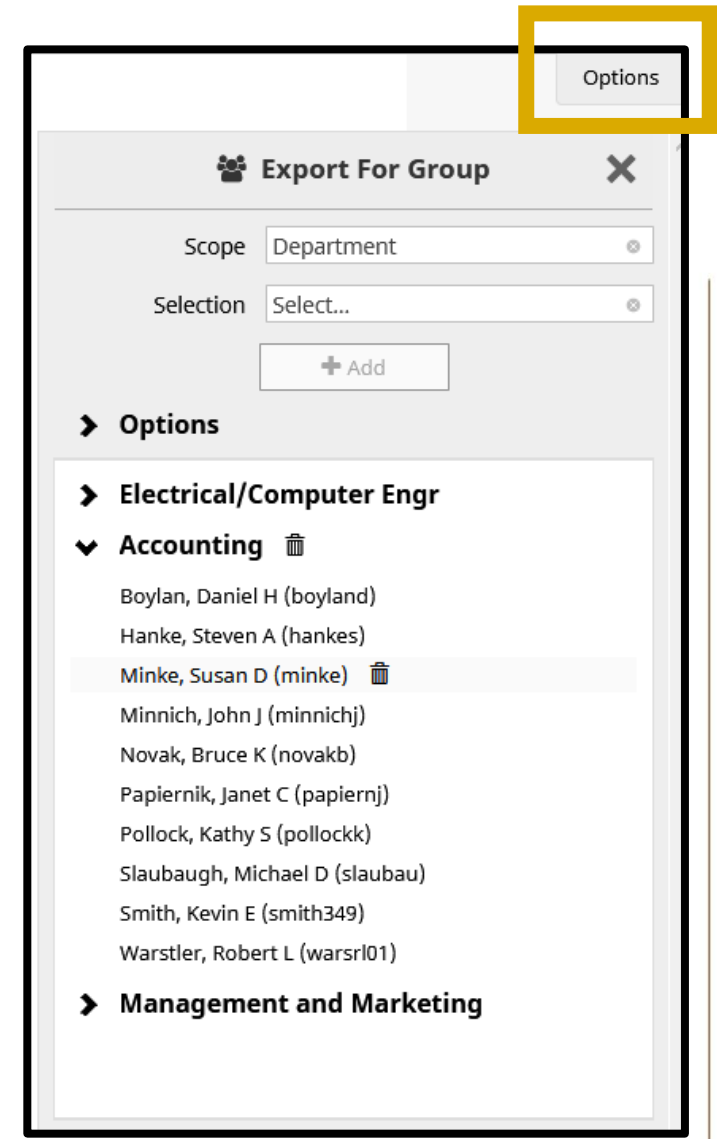
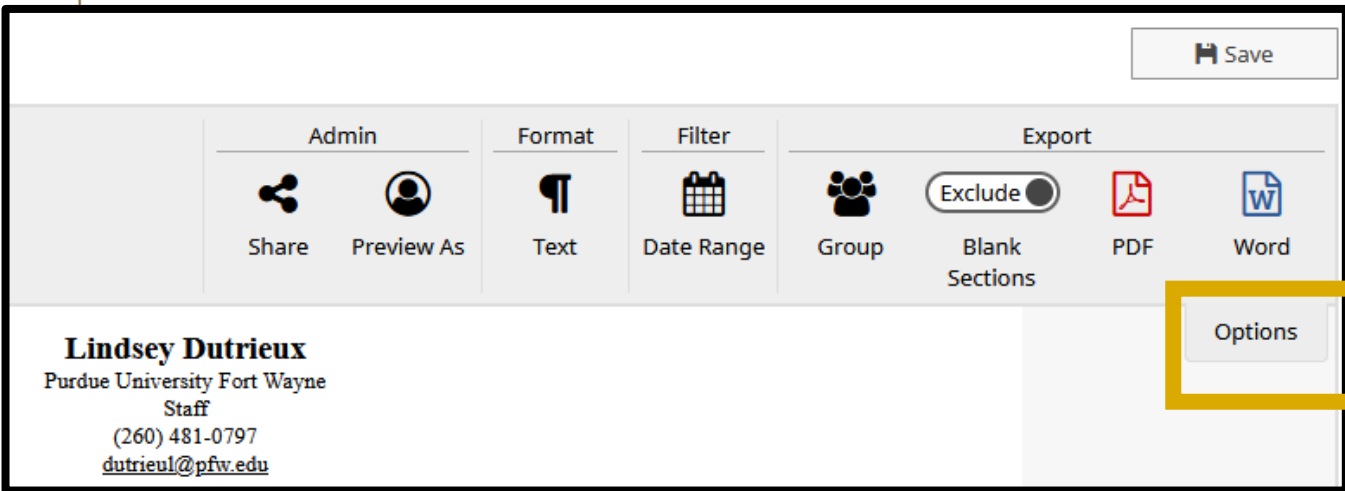
- Ignore date range filter
- ▼ **Activity Type**
  - Conference Attendance
  - Continuing Education Program
  - Faculty Internship
  - Faculty Fellowship
  - Self-Study Program
  - Seminar
  - Tutorial
  - Workshop
  - Other
  - (Blank)
- > **State**
- > **Country**

Using a **Blank** document you can customize headings and Filter/Group by within the needed activities

Filter Group by

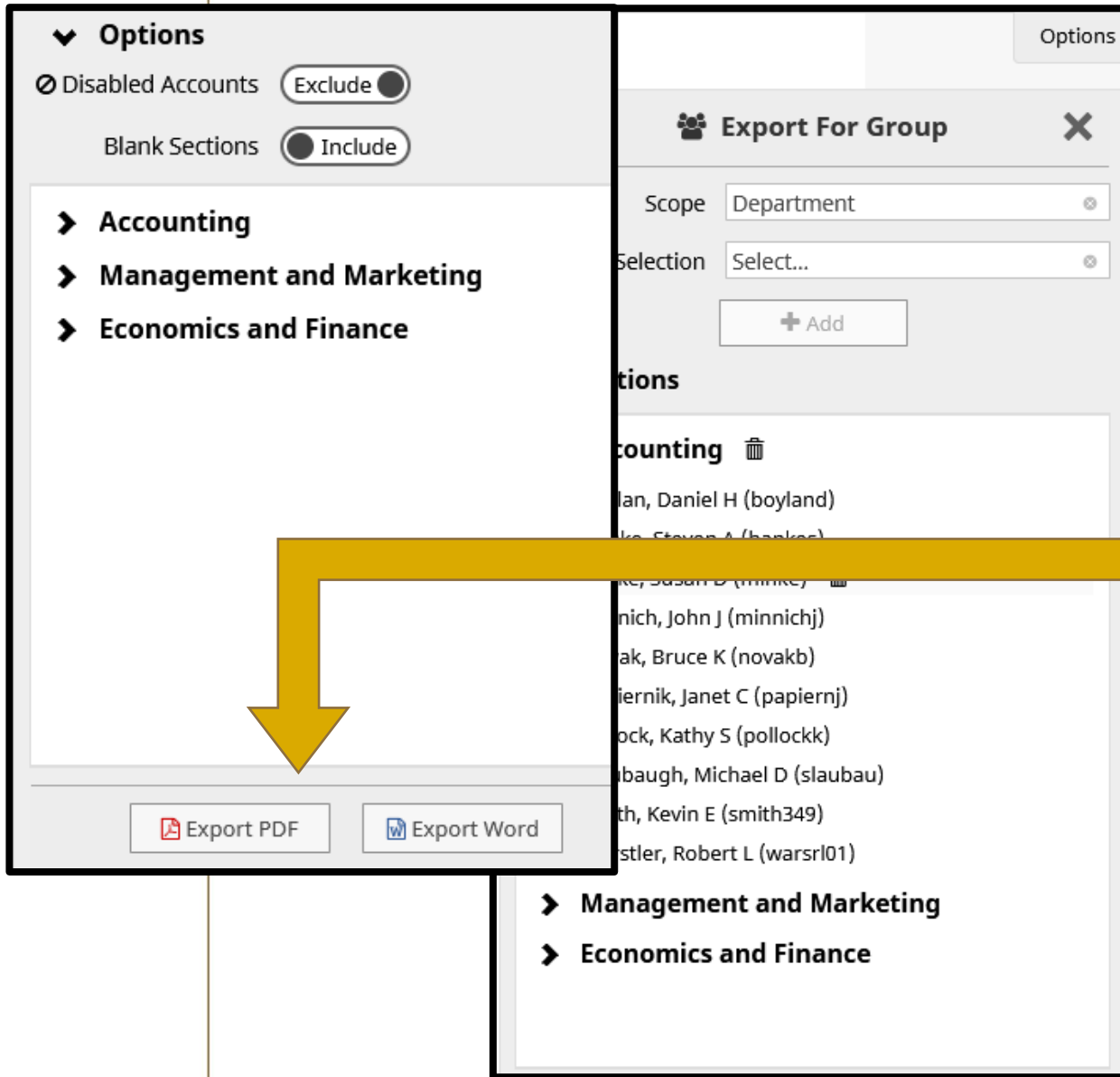
Year

- 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?



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

- Share
- Preview As
- Format Text
- Filter by date and sections
- **\*\*Group\*\***
- Export



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	▼
Doermer School of Business - Productivity Report	Me	Delete
DSB- Lecturer Reappointment Report Template	Me	Duplicate
ETCS Annual Faculty Review	Me	Rename
		▼

Only the creator of a report can choose to Delete, Duplicate, or Rename

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## QUESTIONS

Please contact your Purdue Fort Wayne campus administrator:

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