

Faculty Success: Quick Start Guide

Montana State University collects information for faculty annual reviews, annual reports, discipline-specific accreditation documents and other reports and publications through Faculty Success, a web-based product created and hosted by Watermark. The system is able to produce faculty annual review documents, CVs, pre-defined custom reports, ad hoc reports, and documentation to support P&T dossiers in real time based on the information uploaded, entered, and curated in the database. It also provides MSU with reporting capabilities to support grant applications and help us track metrics for the strategic plan. The software also gives colleges and departments the flexibility to create reports that are specific to their own unit and/or discipline needs.

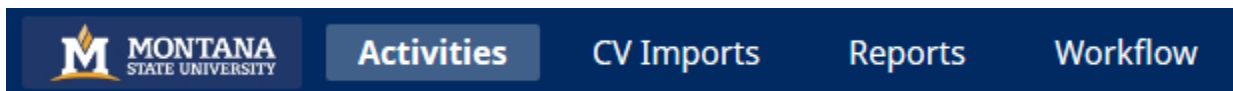
The intent is that rather than multiple offices across campus asking faculty for information about their work several times each year in slightly different ways, faculty members will be asked for information about their activities in one place, using one tool, thus preventing you from having to duplicate reporting efforts. The site is available to update information anytime and from any computer or mobile device that has an internet connection.

Where available and appropriate, we will use data from Banner and other existing databases to pre-populate screens and fields in Faculty Success. The system also allows faculty to load BibTeX files or connect your ORCID publication records so that you do not have to rekey any citation information currently available in variety of reference managers (e.g., EndNote, Mendeley, RefWorks, Zotero) and publication databases (e.g., Google Scholar, PubMed, Scopus, Web of Science).

Additional documentation is available on the Provost's [Faculty Success webpage](#).

Use:

1. **Open** the [Faculty Success Login](#) screen in a browser (any browser: Firefox, Edge, Chrome, etc. – the more up-to-date your browser version, the less chance you will experience odd functionality).
2. **Log on** using your NetID and password
 - a. Your NetID is a seven place alpha-numeric with a standard format consisting of: letter, number, number, letter, number, number, number (e.g. a12b345).
 - b. If you do not know your NetID, you can find it and change the password at UIT's [Self-Service NetID Password Portal](#). You will need to know your GID and MyInfo PIN to proceed.
3. **Top Navigation Bar**





- a. **Activities (data in)** is where you will enter, edit, review, and curate your activities. When you log in, you are taken to the Activities screen by default.
- b. **CV Imports (alternate data input)** is a utility that faculty can use to expedite the data entry process by “directing” data elements from their curriculum vitae into the appropriate fields in Faculty Success. A Watermark produced video walking users through the process is available [here](#).
- c. **Reports (data out)** is where you can run the following reports:
 - Data Quality Issues

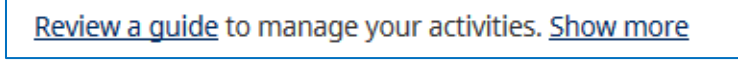
- Governor’s Tribal Relations Report
- Graduate Committees
- MSU Generic Annual Review – Faculty Data
- NIH Biographical Sketch
- NSF Biographical Sketch
- NSF Collaborators & Other Affiliations Information
- NSF Current & Pending Support
- Research Productivity Report
- Student Engagement Report
- Vita
- and any other college/department-specific reports your dean, department head or director asked us to create for your use.

These reports can usually be run as Word documents, html, .csv, and other formats (as may be appropriate to the data).

- d. **Workflow** is a data processing application within Faculty Success. Currently it is used to manage the Faculty Annual Review process, but there is intent to expand its use to facilitate the Retention, Tenure & Promotion (RTP) process.

- e.  **(Help)** sends a help request to MSU personnel. We strive to respond by the next business day after the request is submitted. Keep in mind that Faculty Success help e-mails to MSU personnel are only monitored during regular MSU work days.

- f.  **(Log Out)**. Self explanatory.

- g.  **(Watermark Faculty/Staff Guide)** The “Review a guide” link will take you to a Watermark website with additional overview information.

4. Activities

Search All Activities...

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

▼ **General Information**

Personal & Contact Information	Faculty Professional Enhancement Activities
Biography & Expertise	Media Appearances and Interviews
Web Profile	Awards & Honors
Appointment Data - Permanent Data Yearly Data, Annual Narrative & Goals	Licensures & Certifications
Annual Workload Distribution	Professional Memberships
Administrative Assignments	References
Education	Consulting
Graduate/Post-Graduate Training	Previous/Concurrent Academic, Professional, Government & Military Positions

▼ **Teaching**

Scheduled Teaching	Graduate Committees, Dissertations, and Theses
Other Instruction	Academic Advising - Undergraduate
Directed Student Learning (e.g. undergrad/grad research, independent study, internships, non-MSU thesis/dissertation committees, etc.)	

▼ **Research, Creativity & Technology Transfer**

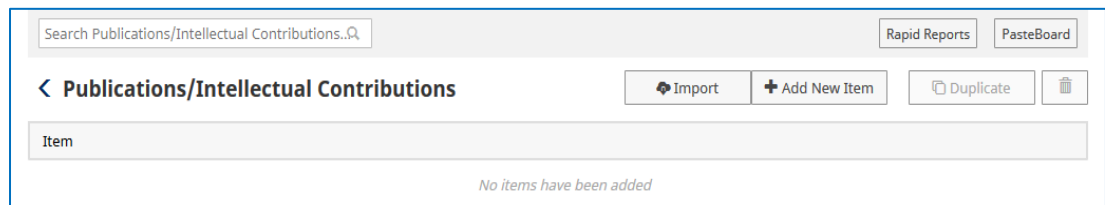
Publications/Intellectual Contributions	Presentations
Artistic & Creative Activities	Intellectual Property (e.g., copyrights, patents)
Grants & Sponsored Research, Contracts, Fellowships	Biographical Sketch - NIH (2015) NIH (pre-2015) and NSF
Research in Progress & Other Funded Activities (not funded through the Office of Sponsored Programs)	

▼ **Engagement, Outreach, and Service**

Engagement Results	Professional
University	Public

- This is the default screen when you log in.
- There are four Sections within the Main Menu: 1) General Information, 2) Teaching, 3) Research, Creativity & Technology Transfer, and 4) Engagement, Outreach, and Service.
- We have pre-loaded as much data as we can from other existing MSU databases. Most pre-loaded data will not be editable. If you see omissions or errors with those items, please refer to the text at the top of the summary screen, record screen, or FAQ (http://www.montana.edu/provost/faculty/activityinsight/AI_FAQ.html) for instructions on who to contact to make additions, deletions, or corrections.
- Screens and individual data elements within screens are customized by college, therefore you may see some items that do not apply to you individually or as a department. If this is the case, you may skip those screens or questions.
- What to enter
 - One of the principal (**but by no means only**) uses of the data in Faculty Success is to support your annual performance evaluation. If you want your department head/chair/campus director, school director, or dean to consider an activity in your review, you should include it in your Faculty Success profile.
 - Some data elements will be used by your department or college for professional accreditation and various other reporting purposes. The more data you provide up front in AI, the fewer requests you should receive to submit supplemental data (e.g. cv's, lists of articles published, etc.)

- iii. Some other data elements are used for university-wide reporting (e.g. our regional accreditation process, Strategic Plan metrics, research productivity reports). We ask you to complete as many items as you are able for use in university-wide reports. Use your best judgment.
 - iv. If you don't know where to put an activity, please ask your department head/chair/campus director where she or he would look for the information, or use the conventions of your discipline to guide you. In most cases, the drop-down menus will guide where an activity goes. If that does not help, send us your question using the Help link in the top ribbon menu. Don't hesitate to ask – your question might spur a change in the screens or the documentation.
 - v. Please remember that the quality and completeness of reports run (by you, your department, college, or the university) is a direct function of the quality and completeness of the data that you enter in your profile. To assist you in identifying common data problems we have developed the **“Data Quality Issues”** report in the Reports section. If you run this report, it will identify potential data quality issues that may reduce the quality of reporting at all levels.
- f. How to enter/correct data
- i. There are lots of data elements, we know. The more the information is parsed going in, the more useful it is coming out. For instance, slicing citation information into small bits allows for you or your department head to create a cv, an NSF or NIH biographical sketch, research productivity report, or other reports based on any style manual required with little or no editing.
 - ii. **Date ranges drive most reports**, so please enter at least the year for each activity (on most screens you will be prompted to do this before you can save new or modified records).
 1. If you can't remember the exact date(s) of an activity, do not obsess over it or spend significant time trying to track it down. The **year** of the activity is of primary importance. If you remember the month, please add that from the drop down too.
 2. Ongoing activities should include a start date with no end date.
 3. One day activities should include an end date with no start date.
 - iii. There are six methods that can be used to get citation information into the Publications/Intellectual Contributions screen.



1. New faculty generally get a one-time courtesy load of publications found through Google Scholar (if you are “John Smith” or there are other authors with your same name, this may not happen). If you have citation data in your AI profile that came in from this one-time load, please review it to make sure the citation is in fact yours, the data is complete, and it is in the correct fields. Also make sure that dates are correct.

2. You can wait for an MSU coauthor to enter the citation! Faculty Success is a relational database. If multiple MSU Faculty Success users authored an article, there will (should) be only one record of the citation data in AI, but it will be associated with all of the authors. The first author to enter a citation will create the citation record for the other MSU AI authors. If you see a record in your list of Publications/Intellectual Contributions that says, “Entered By: *Faculty Name*”, then a coauthor has already created the record. Please do not create a duplicate record. If any of the information entered by your coauthor is incorrect, please work with that individual to correct it. Know that while you can edit any field in a publication record created by a co-author, you cannot delete the record. Only the record owner (person who created it) can delete the record. Generally speaking, we subscribe to the idea that the first (or closest to the first) author should be the record owner.

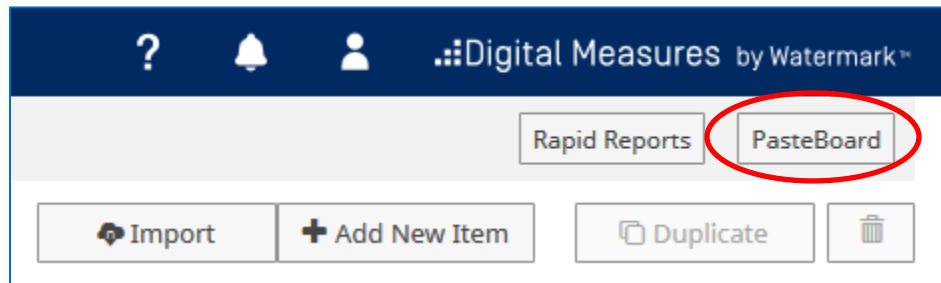
The screenshot shows the 'Intellectual Contributions' interface. At the top, there are buttons for 'Import Items', 'Add New Item', 'Duplicate', and a trash icon. Below this is a search bar labeled 'Item'. The main content area displays a record: 'Entered By: [Godwin, Ian](#)', 'Transforming How Courses Are Delivered: A Model For Teaching...', and the year '2007'. There are also icons for a lock and a square on the right side of the record.

3. You can import a BibTeX file. There is a good chance that citations of your publications are already stored in, or can be compiled by another software system such as a reference manager or database — for example, EndNote, Google Scholar, Mendeley, RefWorks, Scopus, Web of Science or Zotero. Those software systems enable you to pick records and then export them into a BibTeX file. Faculty Success allows you to upload that BibTeX file so that you do not need to rekey those citations. You will find details on how to export publication information from other software systems into a BibTeX file at <https://www.digitalmeasures.com/activity-insight/docs/bibtex.html>.
 - a. **This is way quicker and easier that you think!**
 - b. Most faculty have used “Import from a BibTeX file” (after clicking the *Import* button at the top of the Publications/Intellectual Contributions screen) to import a citation file they created from [Google Scholar](#).
4. Faculty Success also has direct integrations with Crossref, Web of Science, PubMed, and ORCID if you chose the “Import from a Third Party” option (after clicking the Import button at the top of the Publications/Intellectual Contributions screen).

The screenshot shows the 'Import Publications' interface. It includes a header with a back arrow and the title 'Import Publications'. Below the header 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: 'Import from a BibTeX file' and 'Import from a Third Party'. The 'Import from a BibTeX file' section lists sources like EndNote, Google Scholar, Mendeley, RefWorks, HeinOnline, and Zotero, with a 'Choose File...' button. The 'Import from a Third Party' section has a 'Select a service' dropdown set to 'Crossref', search criteria for 'Author' (Faculty X) and 'Publication Date' (2014/07/30 to 2019/07/30), and a 'Search Crossref >' button.

5. You can use the PasteBoard feature to drag and drop within AI rather than switching between your cv and AI. Clicking on the PasteBoard button in the upper, right hand corner of the browser window will open a window/tool (in the lower right hand

corner of your window) that will allow you to copy and paste text from another application (MS Word, etc.). You can then drag and drop elements from the PasteBoard into various data fields.



6. Finally, you can enter citation data by typing it in (not recommended unless you have exhausted all other options above).
- iv. Grants and Contracts that have been applied for through the Office of Sponsored Programs (OSP) electronic Proposal Clearance Form are populated directly from Banner every evening. As with Intellectual Contributions, those with multiple PIs or Co-PIs, have one record shared across multiple MSU faculty. Please note that all PIs or Co-PIs associated with a record will be able to see and edit the data elements that are not locked.
 1. If you are not identified **in Banner** as being a PI or Co-PI on the grant, it will not show up in your *Grants & Sponsored Research, Contracts, Fellowships* list of activities.
 2. If you believe that a grant should be on your list, and it is not, you will need to contact the grant [Research Administrator in OSP](#) to have them add you to the grant in Banner (if appropriate), then it will feed/refresh in AI that evening.
 - v. Where data are pre-populated from university sources, corrections may only be made in the source data (with a few exceptions), not directly by the user in Faculty Success. The reason for this is that we want to be able to fix the underlying data if it is incorrect. If users were able to correct the data in Faculty Success, the incorrect data would still exist in Banner, or whatever other data source the data may have come from. To make corrections to the following “preloaded” data:
 1. Personal and Contact Information - Race and ethnicity - Go to [MyMSU](#), Enter Secure Area, Login, Personal Information, Update Ethnicity and Race. Once changed in MyMSU, please e-mail facultysuccess@montana.edu with notification of the change.
 2. Personal and Contact Information - E-mail address - Go to [MyMSU](#), Enter Secure Area, Login, Personal Information, Update E-mail Addresses. Once changed in MyMSU, please e-mail facultysuccess@montana.edu with notification of the change. Keep in mind that the address we populate in your Faculty Success profile will be the one that will be displayed in your Departmental Web Directory and your Faculty Web Profile.
 3. Permanent Data & Yearly Data - Rank, tenure, FTE, or other job/position appointment information - Contact Human Resources (msuhumanresources@montana.edu) and cc: facultysuccess@montana.edu.
 4. Workload Distribution – This information is not available at the university level (after the initial Letter of Hire year). According to the Faculty Manual annual

workload distribution is determined annually between the faculty member and department head/chair/campus director/school director based on the interest of the faculty member and needs of the department. Contact your department's administrative associate or department head/chair/campus director/school director if the information is not available, or incorrect on this screen.

5. Education – If your educational history is incorrect or incomplete, please visit, fill out, and submit the [Degree History Form](#).
6. Scheduled Teaching (course information) – Please contact the Registrar's Office (registrar@montana.edu) and cc: facultysuccess@montana.edu. The Registrar's Office will need the last four digits of your GID, the course rubric and number, semester it was taught, and CRN. Once the changes are made in Banner, we will provide you with a template to complete so we can upload the data.
 - a. Course evaluation information – This data does not currently get populated in Faculty Success on your behalf. You can export the course evaluation summary as a PDF document from Campus Labs/IDEA and then upload it to the "Additional File" field at the bottom of the course record.
7. Academic Advising – The number of undergraduate students advised is pulled from Banner towards the end of the pre-registration period during the fall and spring semesters. If the number does not match what you think it should be, please ask your departmental administrative staff to make sure that students are accurately assigned to you as their advisor in Banner (this is a departmental responsibility).
8. Graduate Committees, Dissertations, and Theses – This data elements that are prepopulated on this screen are imported from Banner on a weekly basis and are entered by the Graduate School based on the information submitted by the student on the Graduate Program of Study and Committee Form. Contact Laura Collins (lcollins@montana.edu) in the Graduate School to address any incorrect information. Until the form is submitted and processed, the faculty will not have a record of the student on this screen.
9. Grants & Sponsored Research, Contracts, Fellowships – This data feeds directly from banner every evening and is initiated by the submission of the electronic Proposal Clearance Form (PCF). If a grant does not show up in your profile after the PCF is submitted, or a grant is listed in your profile that should not be associated with you, please contact the grant Fiscal manager in the Office of Sponsored Programs (OSP).

5. Reports

Reports + Create a New Report

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

Name	Created By	Actions
Data Quality Issues	Digital Measures	🔒
Graduate Committees	Digital Measures	🔒
MSU Generic Annual Review - Faculty Data	Digital Measures	🔒
NIH Biographical Sketch	Digital Measures	🔒
NIH Biographical Sketch (2015)	Digital Measures	🔒
NSF Biographical Sketch	Digital Measures	🔒
NSF Collaborators & Other Affiliations Information	Digital Measures	🔒
NSF Current & Pending Support	Digital Measures	🔒
Research Productivity Report	Digital Measures	🔒
Student Engagement Report	Digital Measures	🔒
Vita	Digital Measures	🔒

- a. The Reports link is where you can create a CV, a data quality report, list of graduate students, and potentially other reports depending on what College you are in and your security role.
- b. After selecting the report you would like to run, a contextually based list of steps will be displayed. Simply follow the number/steps (**1 – x**) and select the appropriate options.

< Run MSU Generic Annual Review - Faculty Data Run Report

Download this report's template

1 **Date Range**

Start Date

End Date

2 **File Format**

File Format

Changes made to the Microsoft Word document **will not** be reflected in the system.

Page Size

- c. Most reports are date defined. In other words, the person running the report defines the time frame for the data elements being pulled into the report. If you run a report and see undated items in the output, please go back to the record (or if it is someone else's record, ask them to) and add a date to it.
- d. Department heads, directors, and deans can run reports on the faculty activity within their departments, schools, or colleges.

e. You can generally export reports as MS Word, pdf, html, and/or .csv/Excel files. They are editable in related software package.

6. **Help**

a. Visit the [Watermark Faculty Essentials](#) website.

b. Click on grey question marks next to individual items for definitions.

c. Click on the Get Help icon () in the top tool ribbon.