Faculty Success Faculty Training

Presented by:
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11/20/25

Agenda

What is Faculty Success?

Editing and Entering Activities

Faculty Success Reporting

Submitting and Monitoring Reviews

Recap and Demonstration

Questions & Resources

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Introduction

Prior Experience: Worked 7 years in higher education supporting faculty and academic leadership with curriculum, faculty qualifications, and more.

Experience at Watermark: 3 years as a consultant for Curriculum Strategy and Faculty Success

Location: I lived most of my life in Colorado but currently reside in New Braunfels, Texas.

Meagan Crews, She/Her/Hers
Senior Product Consultant
Watermark Client Services

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Housekeeping and Expectations

- This session introduces new users to Faculty Success navigate the interface.
- Feel free to log in and follow along, but it's not required.
- Presentation will feature a demonstration system, your institution may have made configuration changes specific to your campus needs, so some areas will likely be different.
- Feel free to enter questions in the chat. Your administrators may be able to respond during the session, or we will address them during the Q&A at the end.
- The presentation and recording will be shared with your system administrators after the session.

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Learning Outcomes

By the end of this training session, you will be able to:

- Navigate the Faculty Success system

- Revise activities

- Add new activities to your profile

- Create a self-service report

- Run a report

- Submit and monitor a review

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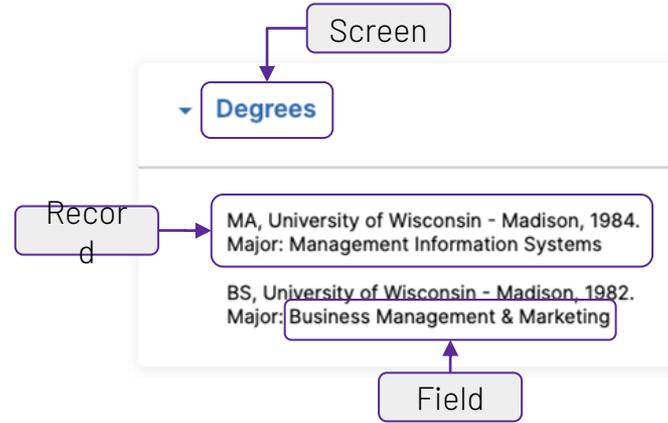# Faculty Success Introduction and Overview

What is Faculty Success?

Faculty Success is a secure, web-based application designed to centralize, manage, and report on faculty activity data. It acts as a central hub where faculty can keep a continuous record of their academic careers and professional activities.

- **Centralized Profile**: It serves as a single place to track and store all professional activities, creating a living professional portfolio.
- **Efficient Reporting**: Faculty can easily generate tailored CVs and reuse data for various reports and reviews to reduce time spent preparing materials.
- **Streamlined Processes**: The system supports efficient data entry, reporting, and reviews with dedicated features for each function.

Faculty data entered into structured fields → **Structured reports display or aggregate faculty data** → **Reports included in faculty review, used to create web profiles, and more**

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Faculty Success Glossary

- **Record**: A single activity in the system, such as a publication, a service activity, or a degree.
- **Screen**: Each record is housed within a screen - defined by type - such as Publications, Degrees, and Scheduled Teaching.
- **Field**: A single point of data on a record, such as a publication title or date.
- **Summary Screen**: A summary/list view of all records on a particular screen.
- **Report**: The output of activity records. A report includes your CV, Annual Activity Report, or other report(s) you create or that are shared with you.

Screen

▾ **Degrees**

Record

MA, University of Wisconsin - Madison, 1984. Major: Management Information Systems

BS, University of Wisconsin - Madison, 1982. Major: Business Management & Marketing

Field

← **Degrees**

🔍 Search...   SEARCH   Search Tips   Rapid Reports   ADD NEW

DELETE   DUPLICATE   COMPARE   SELECT COLUMNS   ← →

Filters: None

	YEAR COMPLETED	DEGREE	INSTITUTION	EMPHASIS/MAJOR	HIGHEST DEGREE YOU H...
☐	1984	✏ MA	University of Wisconsin - Madison	Management Information Systems	Yes
☐	1982	BS	University of Wisconsin - Madison	Business Management & Marketing	No

Summary Screen

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Home

Note: If you have access to Manage Data for others, first click "Switch to Faculty View" from the arrow icon in the upper right.

System Navigation

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Amanda Roberts

- **Home:** Your landing page. This is where you will see pending and completed tasks, an "Add Activity" button, and a faculty guide.

- **My Profile:** Your professional record. Use this item to enter and update activities related to your teaching, scholarly publications, and service. The data you enter here supports reports and feeds into reviews.

- **CV Imports:** This tool helps you quickly create records using your CV. Upload your CV file, highlight entries, and turn them into activities. CV Imports can save time when entering a large number of activities.

- **Reports:** This feature allows you to create and generate reports based on the information in your profile.

- **Reviews:** If your institution uses the Review, Promotion, and Tenure (Workflow) module, this is where you can complete tasks related to your reviews.

Home

My Profile

CV Imports

Reports

Reviews

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Editing and Entering Activities

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Data Entry Fields

Each screen is intended to capture specific types of activities and will include unique fields to capture data. Below are some special features to be aware of:

- **Locked Fields:** Some fields will be locked with a padlock icon because they are managed by administrators or a collaborator. You can't edit these.
- **Required Fields:** Look for fields marked as required. You won't be able to save the record until you fill them out.
- **User Reference Fields:** When you see a field that allows you to select/tag a user from your institution, selecting them will add the record to their profile (in our default configuration).
- **Dates:** Always enter accurate dates. Reports use record dates to include or exclude activities within the reporting timeframe. At least one date (often a year) is required.

You do not have access to modify some of the fields on this screen. If changes are needed, contact your Watermark Faculty Success Administrator, Gregg Amedee.

Term and Year

Term 🔒   Year 🔒

Fall   2017

2nd Author/Editor/Translator

People at Watermark Training

Adelaida, Ruth (radelaida)

Expected Date of Submission

Month   Day   Year ⚠

At least one date is required

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Data Entry Best Practices and Tips

- **Be complete and accurate**: Fill out all relevant fields as completely as possible. The more thorough you are, the better.
- **Avoid placeholder data**: Don't use "N/A," "None," or other placeholders. This might display when generating reports.
- **Enter only relevant information**: Don't feel you have to fill out every field. For example, if you're entering a journal article, you would leave the "name of larger work" field blank.
- **Data entry matters for CVs**: Your CV can only be generated correctly if the data is in the proper fields and formatted correctly. For example, you should not enter citation punctuation (like periods or quotation marks) as these are typically added in the report.
- **Review and clean up imported data**: It's important to review and edit (or request revisions if necessary) any data that was entered for you through system migration or other imports. You are responsible for ensuring data accuracy.

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Revising Activity Data

From **My Profile**, select the screen name to review and edit existing records.

- Review data entered on your behalf
- Revisit activities regularly to update fields like status or dates
- Check for duplicates, compare and merge or delete
- Revise summary screen view with "Select Columns"

Tip: Review of data may also be done by running/creating reports (covered in the next section)

Overview of How To Get Data Into The System

Manual Data Entry
- Faculty enter data directly
- Proxy users (through Manage Data)

Publication Imports
- Proactive Search
- Import from a third party like PubMed or Crossref (note: additional services may be available depending on institutional access)
- Import from a BibTeX file from repositories like Google Scholar

CV Imports
- Utilize highlighting technology to transfer activities from Word CV (note: access to tool determined by institutional administrators)

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Home or My Profile: Add Activity

Add New Activity

Step 1: Select Activity Type

- Top Activities represent most frequent and/or recent screens edited for quick entry
- Search or browse below for all screen options

Add New Activity

Step 2: Add Details

- Fill in relevant data fields for your activity
- Click Save Activity (top right) when complete
- Returns to Home or My Profile and "Activity added to your profile" message appears

Importing Publications

From Home, use our Proactive Search feature to accept or reject publications found in Crossref that may match to you.

- To accept publication, click "New Publication Found"
  - Click "Continue to Edit" to revise any publication details and save to your profile
- To reject publication, click "Reject Publication"
  - You can also reject the publication after opening the record if you're not sure
- Once publication is accepted or rejected, notification will move to "Completed"

Importing Publications

From My Profile, click Publications and then the Import button for additional publication import options.

- Learn more about Bibtex files and upload your file
- Choose additional third party repositories that are available, or search with different parameters in Crossref, such as published work under another name

CV Import
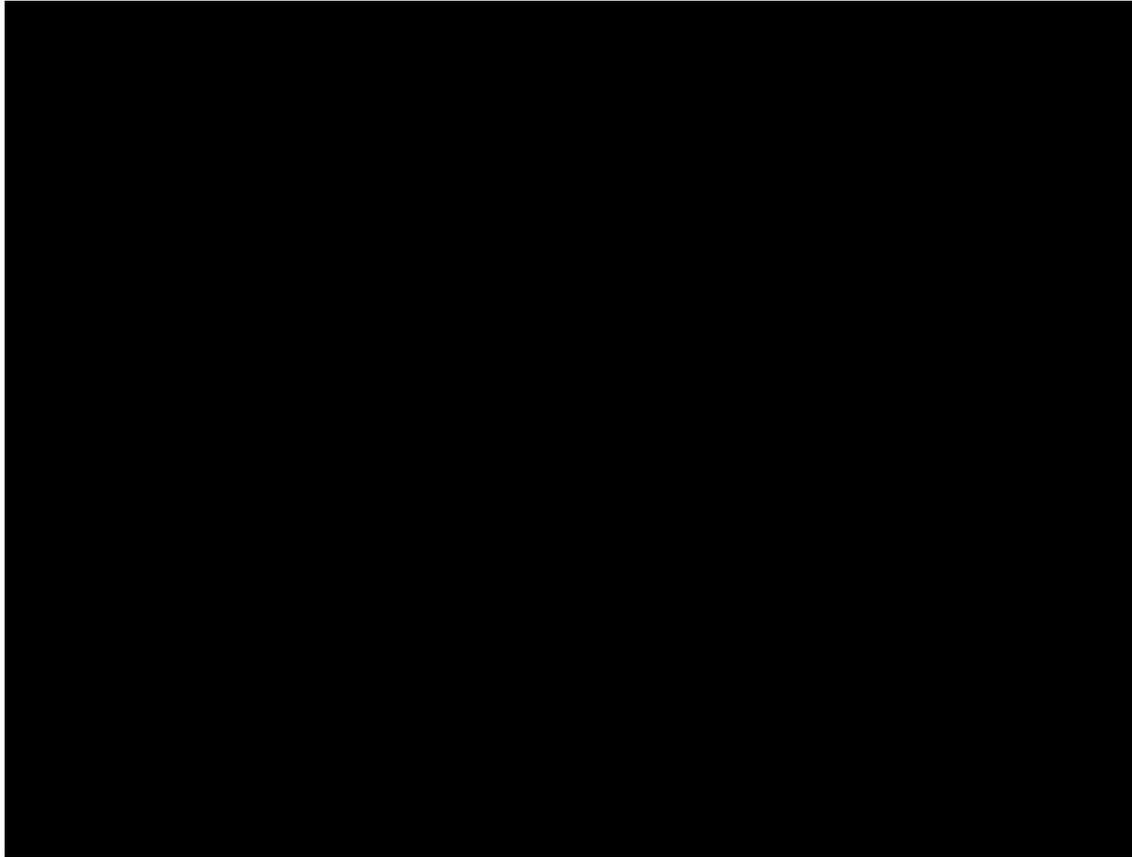
From My Profile, click "Add Activity" and CV Import option or choose CV IMport from the left hand menu.

- Upload your Word document CV
- Follow detailed prompts to select activity type, highlight activities to add, and determine specific record details for each section
- Import CV once complete to bulk create new records

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Reports

Quick CV, Self-Service Reports, Full Service Reports

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Customize Profile & Quick CV

From My Profile, click "Customize Display" and choose the order and heading labels you want for your profile.

Toggle option to view or hide sections with no activity data.

Click Export > Quick CV to generate a preformatted CV based on your individual profile!

Create Self-Service Report

From My Profile, click "Export" and choose Custom Report or select Reports from your left hand navigation and click Create a New Report.

Select a Report Style:
- Blank Document
  - Add all sections needed
  - Examples: a report that only needs research
- Vita
  - Edit/revise default CV sections

Self-Service Options and Capabilities

- Add and reordering sections
- Activity display style options (publication citations; default or custom citations; table view)

- Filter and Group by options
- Formatting (hanging indent, lists, alignment and indents)
- Add/Edit Records

Education

PhD, Iowa University, 2009.
  Major: Health Systems & Nursing Education

MS, University of Cincinnati, 2003.
  Major: Medical Surgical Nursing

BS, Iowa State University, 1999.
  Major: Nursing Education

No items exist for Graduate/Post-Graduate Training

Education

Activities from *Degrees*

Display Style ▾   Table ▾   Filter ▾   Group by ▾

⊕ ADD NEW RECORD

PhD, McCombs School of Business, The University of Texas at Austin, 2004.
  Major: Marketing
  Dissertation Title: Marketing in the 21st century
MS, School of Business, The University of Wisconsin-Madison, 2002.
  Major: Marketing Professor

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Add Section & Activities

- Click the section heading above where the new section should appear
- Click "Add Section" and provide a title
- To add data, click "Add Activities"
- To add static text, click "Add Text"

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Filter and Group by

- Apply a filter to display only records meeting specific criteria.
- More than one filter can be applied.

- Group activities to create sub-sections based on a common attribute
- Filters and groups are based on the screen's drop-down lists and checkbox lists

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Table View

Add and Edit Records

- Allows faculty to add new records or revise existing records in the system directly from their Self-Service Reports
- Previewing for a specific faculty member allows administrators or others with access to manage data directly from report

Activities from *Degrees*

| 66 Display Style ▾ | ⊞ Table ▾ | ▼ Filter ▾ | ▣ Group by ▾ | | | | | | |

⊕ ADD NEW RECORD

PhD, Iowa University, 2009.
     Major: Health Systems & Nursing Education

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Add and Edit Records

Options Tab: Choose Dates and Export

Format
- Change the styling of the headings and subheadings

Report Date Ranges
- Choose all activity dates, or apply a specific date range to your report
- Global date range can be overridden within "Filter" option of each activity section

Export Options
- Blank Sections
- Word and PDF format

Format	Filter	Export		
A	📅	⬭OFF	PDF	W
Text	Date Range	Blank Sections	PDF	Word

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Save Report

Benefits of Self-Service Reports

- Saves time and provides you more autonomy
- Generate individualized reports on faculty activities in the system
- Robust suite of easy to use formatting options; polished outputs
- Custom CVs for Faculty and Admins can share CV templates for institutional consistency

Examples:
- Your institution has standardized annual reporting requirements, but each unit wants to display activities in a different order.
- You apply for a grant every year and need to include only publication and research activities.

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Full-Service Reports

Download Report Template

Run Annual Activity Report

× Download this report's template

Annual Activity Report
Academic Year for the date: [Report End Date]

[First value of [Preferred First Name] and [First Name]] [Middle Name] [Last Name], [Suffix]

[Faculty/Staff Rank]
[list of [Department] separated by "
"]

GENERAL INFORMATION

Workload Information

Screen: *Workload Information*
Items: First record

Teaching:	[Teaching Workload Percentage]%
Research:	[Research Workload Percentage]%
Clinical:	[Clinical Workload Percentage]%
Service:	[Service Workload Percentage]%
Administrative:	[Administrative Workload Percentage]%

Administrative Assignments

Screen: *Administrative Assignments*
Items: All records

[[Position/Role] or [Explanation of "Other"]], [Scope], approximately [Approx. Number of Hours Spent Per Year] hours spent per year. ([Start Date: Month Start Date: Day, Start Date: Year - End Date: Month End Date: Day, End Date: Year]).

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Troubleshooting Reports

Issue: An activity I created is missing from my report.

- Check the report's date range against the record's date
  - The record's date(s) must overlap the report's timeframe

- Check the report template for exclusions
  - Check to make sure the screen is included in the report and whether any criteria may exclude the record (for example, if the Publications section is including only "Accepted" and "Published" records, your "Submitted" publication will not appear).

Issue: I see my activity, but some of the fields I entered are missing or incorrect.

- Compare the report template and the record
  - Not all fields will be set to display on a report. Make sure to compare the report template with the screen: do you see the field name listed? If not, this particular field is not designed to appear in the citation.

Still not sure? Contact your administrator!

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Reviews

Access Submission: Email

Depending on the notification settings chosen for your process by administrators, you likely will receive email notifications when a submission is ready for you to complete.

Additionally, you may receive regular reminder emails, a final reminder before the due date, and/or overdue notifications if the due date has passed.

Invite: Your review materials can now be submitted ▸ Inbox ×

Watermark Faculty Success <notifications@watermarkinsights.com>
to me ▾
9:33 AM (0 minutes ago)

Dear Amanda Roberts,

It's time to submit your review materials for the following:

Process: 2024-2025 Annual Review
Due Date: Wednesday, September 24, 2025 11:59 PM CDT

SUBMIT REVIEW MATERIALS

If the button above does not work, please copy and paste the following link into your browser's address bar:

https://www.digitalmeasures.com/login/wmtraining/faculty/app/workflow/submissions/c6281219-5a52-42d1-bdca-b703cf61ff5f/step/b5d718b9-9230-4d96-bf69-07d9813d2aab/assignee/2166576?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=70c09c63-480f-453d-896a-eb59a88eaac2&orgId=1638&personId=2166576

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Access Submission: Home

From the Home tab in Faculty Success, your review will be listed in the To Do tab in Tasks & To-Dos along with the due date.

Access Submission: Reviews

Finally, from the Reviews tab in Faculty Success, your review will be listed in your Inbox along with the due date and additional details.

Reviews

Annual reviews, promotion, and tenure related processes. Here you will find in-progress reviews, completed tasks, past submissions, and all past reviews.

⌄ Inbox (1)

▶ Show Filters (0)

PROCESS NAME ▾	STEP ▾	DEPARTMENT ▾	CANDIDATE ▾	DUE DATE ⇅▾	DATE RECEIVED ▾
2024-2025 Annual Review	Faculty	Management	Me	September 24, 2025 @ 11:59 PM	August 25, 2025 @ 9:33 AM

⌄ History

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
		No Data to Display		

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Completing a form

The submission forms available to faculty and reviewers are customized for each specific process and step by the Reviews, Promotion and Tenure (RPT) Administrator.

Certain fields may be set as required. This is a configuration choice made when the form was created.

When reviewing and contributing to a form, you will see different types of fields, such as:

- File Upload
- Rating Scale
- Text box
- Report (generated from Faculty Success)
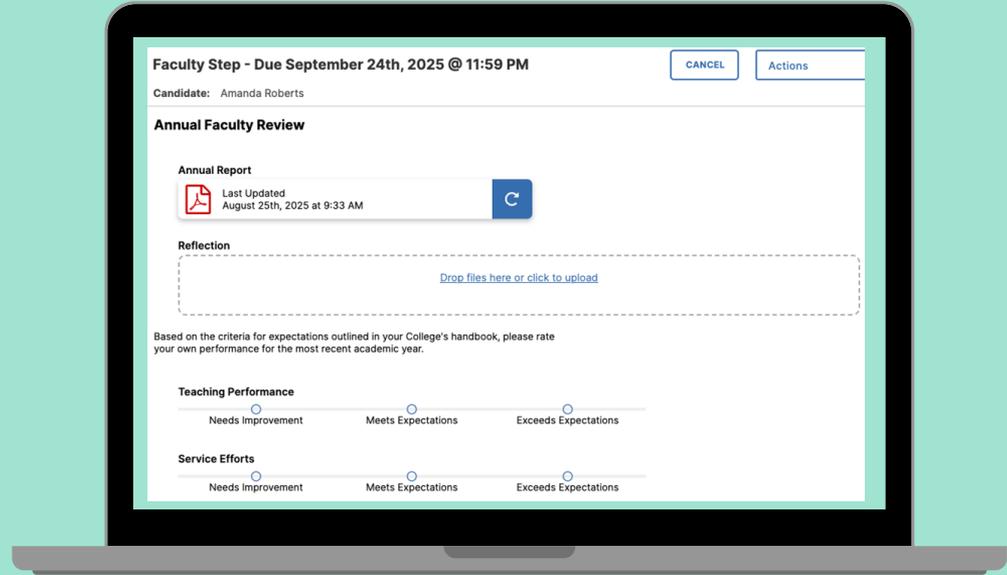
Example of Field Types on a Form

Reports Within a Workflow Form

Your form may have been configured to automatically include a **report from Faculty Success**, populated with data you entered into your profile. This report is generated when the process launches. You have the ability to preview the report (select the PDF icon to open your report), and if you notice any issues in the report or realize that additional activities need to be entered into the database, you can:

1. Save a draft of your progress on the form by accessing the **Actions** menu in the top right and selecting **Save Draft**.
2. Navigate to My Profile.
3. Add or revise the appropriate activity or activities.
4. Return to the submission and refresh the report (select the circle icon), so the updates are reflected in the report.

Report - Label

Last Updated
Date and Time

C
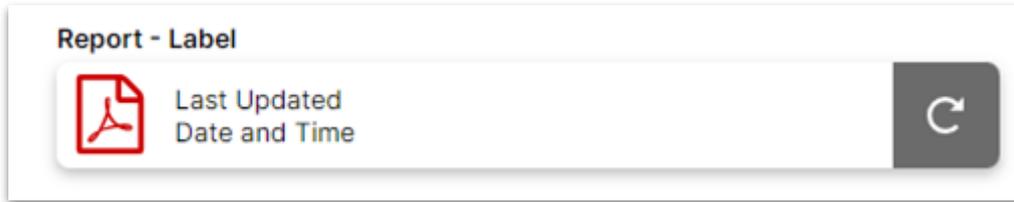
Important! You are responsible for ensuring that the information in your report is complete and accurate prior to submitting your review, just like if you uploaded your own CV or activity report. If you believe the report is reflecting data inaccurately, please contact your administrator.

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Submitting your form and other actions

When you have completed your form and are ready to submit it to the next step, click on the Actions button in the top right corner. Your Action options will be listed there.

You can "Save Draft" and return to your form at another time, or "Submit" to the next step (verbiage may vary).

Recalling a Step

If you advance a submission to the next step, you can recall the submission from that step to:

- Correct factual or typographical errors
- Add a critical piece of information that was missed
- Further review a submission that was prematurely advanced

NOTE: Once the next step has begun, the recall option is no longer available

From the form:

From History:

Monitoring Your Submission

After your have advanced the submission to the next step, you will see it move from the Inbox to History. There, you can see where in the process the submission stands as it advances through each future step, and, depending on the form visibility settings, review the content of the submission and the fields completed by reviewers.

The history of your submission will remain available to you for future reference.

Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

⌄ Inbox

▸ Show Filters (0)

NAME ⌄	STEP ⌄	CANDIDATE ⌄	DUE DATE ↓↑ ⌄	DATE RECEIVED ⌄
		No Data to Display		

⌄ History (1)

| NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
2023-2024 Faculty Annual Evaluation	Dean	Me	August 18, 2024 @ 11:59 PM	⌄

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System Demo: Key Features

Live demonstration of keys tasks:

1. Create a new record & revise manually
2. Import publication via Proactive Search
3. Create and download a Self-Service Report (Vita)
4. Complete and submit a Review
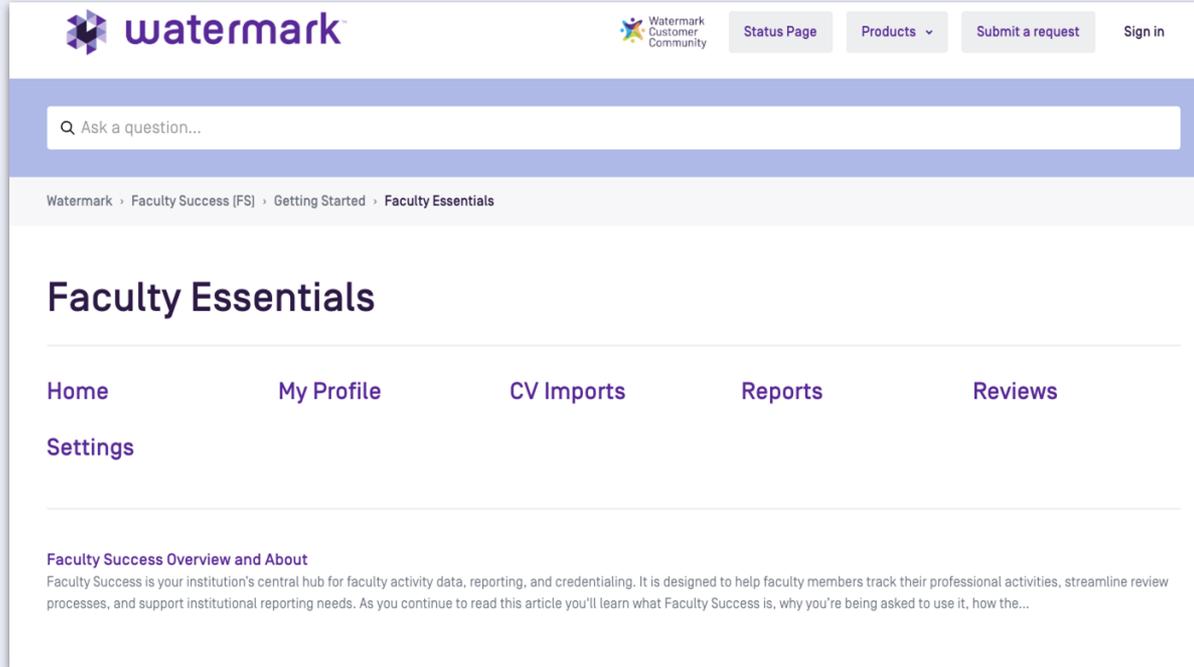
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Finishing Up

Help Tools and Faculty Essentials
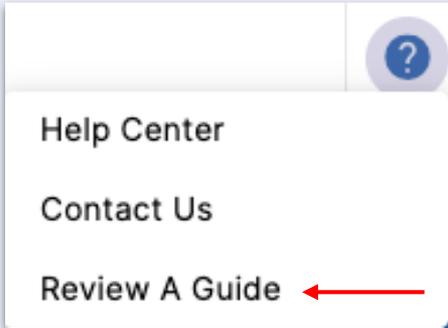
Navigate to the Help Center via the question mark icon in the upper right of Faculty Success. You can find a direct link to the Faculty Essentials Guide or review the full Help Center.

Use the Contact Us option to reach out to your administrator or Watermark Support with questions or issues.

Watermark › Faculty Success (FS) › Getting Started › Faculty Essentials

Faculty Essentials

| Home | My Profile | CV Imports | Reports | Reviews |

Settings

Faculty Success Overview and About

Faculty Success is your institution's central hub for faculty activity data, reporting, and credentialing. It is designed to help faculty members track their professional activities, streamline review processes, and support institutional reporting needs. As you continue to read this article you'll learn what Faculty Success is, why you're being asked to use it, how the...

What are your next steps?

Utilize resources to assist with your primary goals!

- Save this End-User Training slide deck and recording for reference
- Bookmark the Faculty Essentials guide in Help Center
- Review additional training and/or materials provided by your campus administrators
- Know who your campus subject matter experts and administrators are that can assist you with questions as you complete tasks

Enter activities

- Manually enter/edit records
- Complete publication import
- Try out CV Import

Run reports

- Create your own CV
- Review reports shared by administrators
- Verify your data and revise as needed

Submit reviews

- Watch for emails or "To-Do" items
- Complete and submit forms by due date

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Questions?

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Thanks

FOR YOUR ATTENTION