UNO User's Guide
(In Progress)

watermark™ Faculty Success | formerly Digital Measures

UNO Office of Institutional Effectiveness
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INSTITUTIONAL
EFFECTIVENESS

Watermark Faculty Success UNO User's Guide **(In Progress)**

General Notes:

- This documentation is in progress. Sections that have yet to be covered will be marked as "*Pending*".
- Throughout this documentation, items in green apply only to Criss Library personnel; items in blue apply only to those with unit level access or higher (i.e. department chair / director, dean, etc.); items in orange apply only to CBA personnel.
- The only required field on any screen is a date containing at least a year
  - o An entry with a start date but *no end date* will continue to be included in reporting year-after-year until an end date is entered. This is best for ongoing appointments, committee seats, etc.
  - o An entry with an end date but *no start date* is for a one-time occurrence. For example, under *Non-Credit Instruction Taught*, a faculty member may have a workshop that they lead on a single day.
- If a field is locked, it means those data are being fed from another system. (e.g. PeopleSoft, NuRamp, Course Evaluations, etc.) *Any changes to the data in these fields need to be made in the source system.*
- Entries that involve co-authors/co-investigators/etc. can be linked to the Faculty Success account of a co-author/co-investigator/etc. that is also from UNO. Be sure to select them from the "People at University of Nebraska at Omaha" field. The entry will also appear in their account but won't be double counted when we perform aggregated reporting.
- The "P" demarcation indicates the fields that contain data that is publicly available and may be used for the purposes of faculty bio pages
- A button labeled "Pasteboard" will appear in the upper right of the screen while entering activities. (Only in certain browsers) Clicking that will open a pop-up window like the below. An entire document, such as a CV, can be pasted into this window. Then, by highlighting specific text, it can be drag-and-dropped into individual fields.
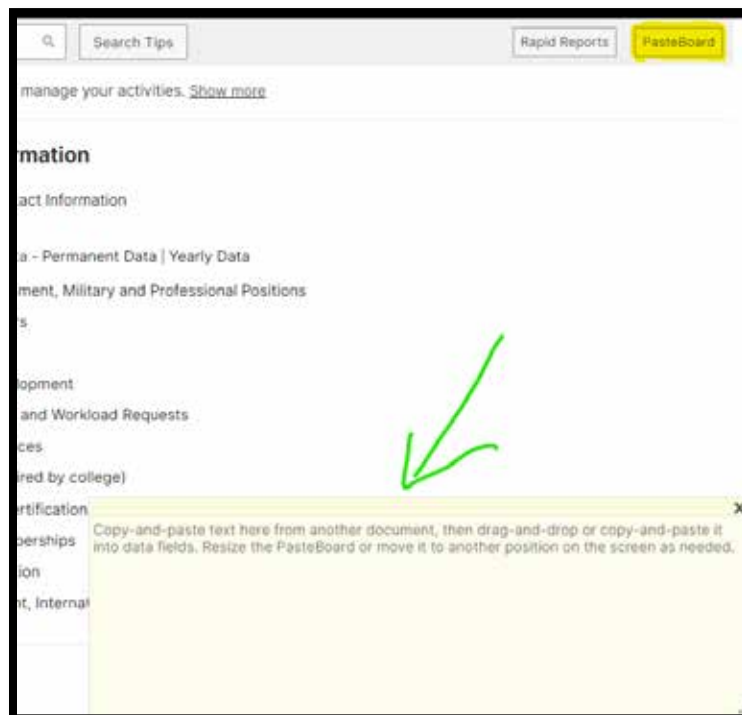
1.0 Screens

This section will provide an overview of each screen accessible under the *Activities* tab.
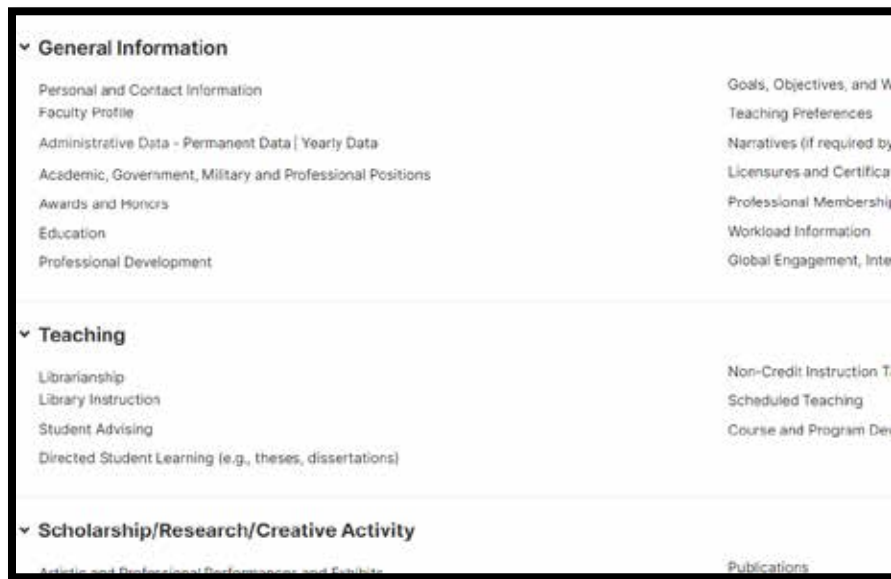
1.1   General Information

a. *Personal and Contact Information* contains personal data that does not often change. (e.g. office location, phone, etc.)
   i. Notes:
      1. Prefix options are Mr., Ms., Mrs., Professor, or Dr.
      2. Suffix options are Sr., Jr., II, III, IV, V
         a. Does *not* include academic suffixes. These are captured under *Education*.
      3. Information on this screen will be used to populate faculty profile pages at unomaha.edu. If fields are left blank those fields will not display on the faculty profile page.

b. *Faculty Profile* contains personal information that is periodically updated (e.g. publications, research interests, service positions held, etc.).
   i. Notes:
      1. For the selections under **General Information**, **Scholarship / Research / Creative Activity**, and **Service**, the faculty member will pick existing entries from other screens using the drop-down fields.
      2. Faculty can select up to 10 entries in each section to display on their profile page.
      3. The information on this screen is used to populate faculty profile pages on unomaha.edu. If any fields are left blank, the empty fields will not display on the faculty profile page. For any links, please include https:// in the URL.

c. *Administrative Data*: The screens below track faculty employment information and will need to be filled out by the faculty member.
      1. *Permanent Data* tracks the employment data that will not change. (e.g. hire date, tenure year, etc.).

2. *Yearly Data* tracks employment data that may change. (e.g. rank, department, etc.).
   a. Notes: This screen will be "copied-forward" for faculty each academic year.
3. This screen includes AACSB elements for CBA personnel.

d. *Academic, Government, Military and Professional Positions* captures a faculty member's past work experience.

e. *Awards and Honors* tracks any honors faculty have received.

f. *Education* captures faculty education credentials including an indication of highest degree earned.

g. *Professional Development* tracks faculty professional development activities including workshops, communities of practice and conference attendance (as attendee only; conference presentations will be captured on the *Presentations* and/or *Publications* screen)

h. *Goals, Objectives, and Workload Requests* captures faculty "Goals and Objectives" for "Attachment II" of the *Faculty Annual Review Report.*
   i. *Note: The workload request portion of this screen is under development. Faculty will continue to use the current process for workload requests used by their unit for the time being.*

i. *Teaching Preferences* captures faculty course preferences for a specific academic year.
   i. *Note: This screen will be a part of the workload request process. The distinction being this screen captures the courses desired and the workload request will capture workload hours only.*

j. *Narratives (if required by college)* captures the narratives required by some colleges to be included on the *Annual Review* and/or *Reappointment, Promotion, and Tenure* reports.
   i. Note: This screen includes AACSB elements for CBA personnel.

k. *Licensures and Certifications* captures any special licenses, certifications or micro-certifications that may not fit under *Education.*

l. *Professional Memberships* captures any trade or professional organizations to which faculty have membership.

m. Workload Information
   i. This screen captures a faculty member's *actual* workload they had for a particular academic year.
   ii. Note:
      1. The fields of this screen are currently hidden as the workload request process is still being developed.

n. Global Engagement, International Partnerships & Exchange Programs
   i. THIS SCREEN IS NO LONGER USED

1.2 Teaching

a. *Librarianship* tracks library activities of Criss Library faculty including (but not limited to) Assessment, Collections and Patron Services.

b. *Library Instruction* tracks instructional services provided by Criss Library faculty.

c. *Student Advising* tracks the number of students to whom faculty provided academic, career, or other advising services.

d. *Directed Student Learning (e.g., theses, dissertations)* tracks any academic advisory committees of which faculty was a member or chair. This includes (but not limited to) doctoral advisory committees, dissertation committees and Capstone project advising.

e. _Non-Credit Instruction Taught_ tracks teaching activities that are not related to a credit-hour course, such as leading a workshop, providing a guest lecture, or teaching a seminar.

f. _Scheduled Teaching_ tracks the courses faculty teach each term. It also captures the dimensional averages from the course evaluations for each course section.
    i. These data are imported periodically (at least once/term) from PeopleSoft and the course evaluation system. These imported fields will be locked but updated accordingly.
    ii. This screen includes AACSB elements for CBA personnel.

o. _Course and Program Development_ captures any courses or programs faculty helped develop.

1.3 Scholarship/Research/Creative Activity

a. _Artistic and Professional Performances and Exhibits_ tracks faculty artistic endeavors including everything from art exhibits and music performances to theatrical productions and musical conducting.

b. _MavGrants Externally Funded Projects_ tracks any faculty grant projects that were processed through ORCA's MavGrants system.
    1. Data on this screen are pushed on a weekly basis from the MavGrants system. _Changes to locked fields need to be made in MavGrants._
    2. _Note: The data imported to this screen are being improved in conjunction with the ORCA Advisory Committee. Expect new and more useful data to appear here as we progress._
    ii. This screen includes AACSB elements for CBA personnel.

c. _NuRamp Internally Funded Projects_ tracks internal grant competitions run through the NuRamp system. These include FIRE, FUSE, GRACA, etc.
    1. Data on this screen are pushed on a weekly basis from the NuRamp system. _Changes to locked fields need to be made in NuRamp._
    2. _Note: The data imported to this screen are being improved in conjunction with the ORCA Advisory Committee. Expect new and more useful data to appear here as we progress._
    ii. This screen includes AACSB elements for CBA personnel.

d. _Other Externally Funded Projects_ tracks any grant projects that were NOT processed through ORCA's MavGrants system.
    i. This screen includes AACSB elements for CBA personnel.

e. _Other Internally Funded Projects_ tracks internal grant competitions that did NOT run through the NuRamp system.
    i. This screen includes AACSB elements for CBA personnel.

f. _Publications_ tracks faculty publications (submitted or published) including (but not limited to) journal articles, art images, technical reports, and books.
    i. This screen includes AACSB elements for CBA personnel.

g. _Intellectual Property (e.g. copyrights, patents, etc.)_ tracks any copyrights (other than publications) or patents faculty hold.

h. _Presentations_ tracks presentations faculty have given including lectures, paper presentations, poster sessions, etc.
    i. This screen includes AACSB elements for CBA personnel.

i. _Research Currently in Progress_ tracks on-going research, or research not yet ready for publication.

1.4 Service

    a. *Institutional* captures any committees of which faculty are a member at the University, College or Departmental level.

    b. *Professional* captures any committees of which faculty are a member within their field but outside of the university.
        i. This screen includes AACSB elements for CBA personnel.

    c. *Community* captures any committees of which faculty are a member in the community. This is also where faculty would track any days of service or volunteer work they do.
        i. This screen includes AACSB elements for CBA personnel.

    d. *Media Contributions* captures any interaction faculty have had with the media either on behalf of their profession, expertise, or the university.

    e. *Consulting* captures any consultation activities faculty have had with organizations outside of the university. These include activities like expert testimony in litigation, consultation with a private business or governmental agency, etc.
        i. This screen includes AACSB elements for CBA personnel.

    f. *Administrative Assignments* captures any administrative appointments faculty hold such as department chair / director, dean, graduate program chair, etc.

2.0 Reports

This section will give an overview of the various report parameters and reports available within Faculty Success.

2.1 Reporting Parameters Screen Overview:

   a. *Download this report's template* will generate a Word document that will provide a detailed breakdown of a report. This can be used determine the criteria required for a specific record to appear in a specific section of the report.

       1. *Screen* indicates the screen within Faculty Success that is the source of the data.

       2. *Items* indicates which records to include (i.e. all records, most recent record, records not included above, etc.).

       3. *Criteria* indicates the required status of fields on the above screen to have a record appear here.

       4. The fields listed below the grey box indicate which fields from the above screen are being pulled into the report.

       5. Example

          a. This section of the report will pull any record (within the specified report date range) from the "Awards and Honors" screen that has not yet been displayed in this report, and the field "Purpose" has a value of "Scholarship/Research". It will then display the fields indicated. (below the grey box)

   b. *Date Range* indicates the start and end dates this report should encompass.

   c. *Whom to Include* indicates which faculty members should be included in this report (unit level access only)

   d. *File Format* indicates the type of file the system should output (i.e. Microsoft Word .doc, PDF or .html) Word format will be used most often.

e. *Run Report*: Clicking this button will generate the document with the parameters that have been set.

2.2 Rapid Reports
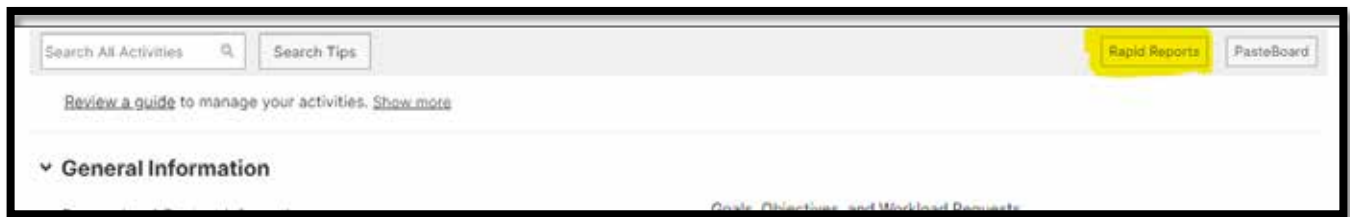
a. When managing activities, a button will appear at the top right of the screen labeled "Rapid Reports." (Next to "Pasteboard")
b. Clicking this button will bring up a pop-up screen that looks like the below:

c. This will allow the user to set parameters and run a report without having to go through the report parameters screen.

2.3 Common Reports
a. *Annual Review*
   i. There is a different report for each college. Be sure to select the report appropriately marked.
   ii. The date range used is the calendar year for annual review.
      1. E.g. the submissions made in 02/2022 will have been set to start on January 1, 2021 and end December 31, 2021.
b. *Reappointment, Promotion, and Tenure*
   i. There is a different report for each college. Be sure to select the report appropriately marked.
c. *Vita and Vita Creator* **Pending**
d. *Unit Level Reports* **Pending**
   i. *Accreditation Reports*
      1. AACSB
      2. ABET
   ii. *Productivity Reports*

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1. AR Research Table
2. AR Service Table
3. AR Summary Table
4. AR Teaching Table
5. Course Evaluation Summary Table

iii. *Administrative Reports* **Pending**
1. Workload Request
2. Teaching Preferences

3.0 Workflow

Before getting into the meat of Workflow, there are terms you will need to be familiar with:

- · <u>Workflow</u>: This refers to a template for routing. Different units route things in different ways or require different language used within the review. The Workflow is the overall framework that defines those variations.
- · <u>Schedule</u>: This refers to a specific review cycle. Schedules will have names like CY 2021 Annual Review.
- · <u>Submission</u>: This refers to an individual faculty member's line of review.
- · Each Workflow has multiple Schedules and each Schedule has multiple Submissions. (see illustration below)

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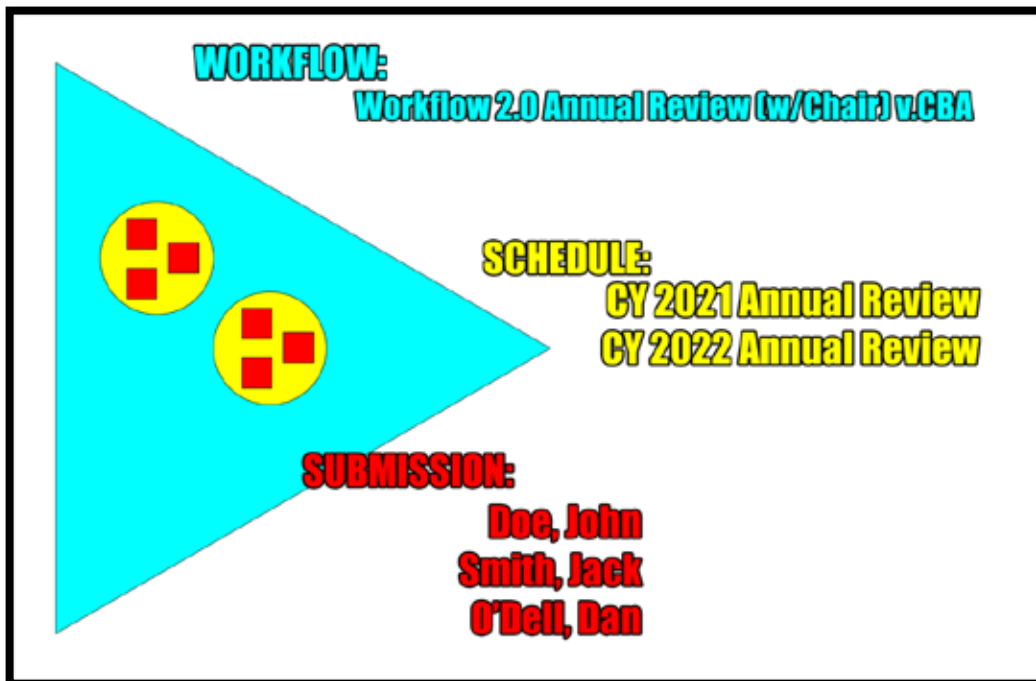
3.1 Annual / Merit Review

1) Workflow Overview
   a. *Faculty Step:* The faculty member uploads their finalized Annual Review, Goals and Objectives report to the Attachments I and II link provided.
      i. General comments faculty feel are relevant can be provided in the Comments (optional) text box.
      ii. The faculty member must enter their name in the Faculty Signature field. By providing this, they agree that this electronic signature is the legal equivalent of their manual signature within the Faculty Success system.

Activities   Reports   **Workflow** ▾

< **Faculty Form**

* Attachments I and II

Drop files here or click to upload

Comments (optional)

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By signing your name electronically below you are agreeing that your electronic signature is the legal equivalent of your manual signature within the Faculty Success system.

* Faculty Signature

b. *Committee Step:* (if used by unit)
    i. *Committee Chair*
        1. The committee chair is responsible for submission to the department chair / director.
        2. *Only the committee chair has access to committee member comments.*
        3. The committee chair may be required (depending upon unit) to enter their name in a Signature field. By providing this, the committee chair agrees that this electronic signature is the legal equivalent of their manual signature within the Faculty Success system.
        4. Committee chair screen will look similar to the below, listing each committee member as collapsible line items containing their comments / ratings.

▲ | × Cancel | Actions ▼

⊟ Save Draft

↱ Complete required fields to Submit

↰ Send Back to Previous Step

⌄ Committee Members and Responses

| By Member | By Response |

⌄ Nealy Grandgenett (chair)

ANNUAL ASSESSMENT AND MERIT REVIEW REPORT FORM

Directions: This form is to be used by each faculty member to report the performance rating of satisfactory, unsatisfactory or meritorious and **IF MERITORIOUS**, the score he/she has determined for the areas of teaching, research/creative activity, and service for every other faculty member and himself/herself. Transfer the teaching, research/creative activity, and service scores from each annual assessment and merit review worksheet to this form. **IF SATISFACTORY OR UNSATISFACTORY IS CHECKED NO VALUES SHOULD BE ENTERED UNDER TEACHING, RESEARCH OR SERVICE AND IF VALUES ARE ENTERED THEY WILL BE DISREGARDED.**

Rating

○ Satisfactory | ○ Unsatisfactory | ○ Meritorious

Evaluation of Performance *(Provide Score for Each Area and Total)*

Teaching [ ]

Research [ ]

Service [ ]

Total [ ]

Comments

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[ ]

By signing your name electronically below you are agreeing that your electronic signature is the legal equivalent of your manual signature within the Faculty Success system.

* Evaluator Signature [ ]

> Adam Rosen — Last Reviewed February 11, 2022

> Christopher Burcal — Last Reviewed February 14, 2022

> Danae Dinkel — Last Reviewed February 16, 2022

> Dustin Slivka — Last Reviewed February 14, 2022

> John Noble — Last Reviewed February 18, 2022

> Matthew Heesch — Unreviewed

> Michaela Schenkelberg — Last Reviewed February 18, 2022

> Richard Stacy — Unreviewed

> Ronald Bulbulian — Last Reviewed February 16, 2022

> Samuel Wilkins — Last Reviewed February 15, 2022

> Sofia Jawed-Wessel — Last Reviewed February 18, 2022

> Song-young park — Last Reviewed February 10, 2022

This Committee's Response

* Attach Recommendation Memo

Drop files here or click to upload

🗎 Blank Committee Spreadsheet.xlsx **(21.19 KB)**
   🗑 Delete File

Comments

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Summary spreadsheet provided to School Director

By signing your name electronically below you are agreeing that your electronic signature is the legal equivalent of your manual signature within the Faculty Success system.

* Department Committee Chair [Neal Grandgenett]

ii. Committee Member
   1. The committee member screen will vary based upon unit. It will include any relevant instructions on ratings or comments.

2. Committee members cannot see each other's comments / ratings (Only the committee chair has visibility).
    a. *Note to Unit Leads: This feature can be turned off by the system admin if unit requires that level of visibility.*
3. The committee member may be required (depending upon unit) to enter their name in a Signature field. By providing this, the committee member agrees that this electronic signature is the legal equivalent of their manual signature within the Faculty Success system.
4. At minimum, a committee member screen will look something like the below.

iii. *Special Cases / Alternates*
    1. If the faculty member being reviewed is also the committee *chair*, an alternate committee chair will need to be appointed for that submission.
    2. If the faculty member being reviewed is also a committee *member*, they must recuse themselves from voting or providing comments if the task appears for them.

c. *Department Chair / Director Step:*
   i. The department chair is responsible for submitting Attachment III and Attachment IV, plus an overall rating.
      1. Fields here may vary slightly based on unit.

Department Chair / Director Form

Attachment III – Assessment of Performance for the Last Calendar Year

Overall Performance
   ○ Satisfactory   ○ Unsatisfactory

Attachment IV – Assessment of Goals & Objectives Proposed for the Next Year

Attachment(s) (Optional)
   Drop files here or click to upload

By signing your name electronically below you are agreeing that your electronic signature is the legal equivalent of your manual signature within the Faculty Success system.

Department Chair / Director Signature

d. _Faculty Response Step_:
    i. The faculty member must indicate if they concur with the department chair / director's assessment, or if they are submitting comments to the dean.
    ii. Faculty have 10 days to complete this step.
    iii. Faculty can enter their comments to the dean in the "Comments" text field, or upload them via the provided link.
    iv. The faculty member must enter their name in the Faculty Signature field. By providing this, they agree that this electronic signature is the legal equivalent of their manual signature within the Faculty Success system.

< Faculty Response Form

Pursuant to Section 4.6 of the Regents Bylaws, I have had the opportunity to examine the material submitted with this assessment and understand that I have the opportunity to submit documents and/or written comments, which I feel should be considered. (These additional documents and/or written comments should be submitted to the dean no later than ten (10) days after the deadline for the receipt of this assessment.)

* Do you concur with Chair's / Director's assessment?
    ○ Concur
    ○ Comments Below and/or Attached

Comments (optional)
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Comments Upload (optional)
Drop files here or click to upload

By signing your name electronically below you are agreeing that your electronic signature is the legal equivalent of your manual signature within the Faculty Success system.

* Faculty Signature

e. *Dean Step*:
    i. This step will vary based upon college. At a minimum, the dean must enter their name in the College Dean Signature field. By providing this, the dean agrees that this electronic signature is the legal equivalent of their manual signature within the Faculty Success system.
    ii. Upon clicking "Submit" this workflow will close out

f. *Variations by College / Unit*
    i. Each of the above forms will have slight variations depending upon unit. (e.g. Different rating scales, additional file uploads, etc.) All of which are self-explanatory, or instructions are provided.

2) *Review of Department Chairs / Directors*

The review of department Chairs / directors follow a similar workflow to faculty.

a. *Department Chair / Director Step*
    i. Like other faculty, department chairs and directors are required to submit Attachment I and II.
    ii. Some colleges may require department chairs and directors provide additional information relating specifically to their administrative role. These additional fields will appear on this screen.

b. *Dean Step*
    i. The dean provides feedback to the department chair / director and submits Attachments III and IV during this step

c. *Department Chair / Director Response Step*
    i. The department chair / director must indicate if they concur with the dean's assessment, or if they will be submitting comments to the senior vice chancellor.

      ii. Department chairs / directors have 10 days to submit their comments to the senior vice chancellor and complete this step. Doing so will close out this workflow.

3.2 Reappointment, Promotion, and Tenure *Pending*

1) 1st & 2nd Year Workflow
    a. Faculty
    b. Department Chair / Director
    c. Faculty Response to Chair / Director
    d. Dean
    e. Faculty Response to Dean
    f. Closeout Authority (optional)
2) 3rd-5th Year / Promotion Workflow
    a. Faculty
    b. Department Personnel Committee
        i) Committee Chair
        ii) Committee Member
        iii) Special Cases / Alternates
    c. Faculty Response to Department Committee
    d. Department Chair / Director
    e. Faculty Response to Department Chair / Director
    f. College Personnel Committee
        i) Committee Chair
        ii) Committee Member
        iii) Special Cases / Alternates
    g. Faculty Response to College Committee
    h. Dean
    i. Faculty Response to Dean
    j. Closeout Authority (optional)