SHSU Watermark Faculty Success Reports Guide

Tips Before You Start

Report Data pulled from Activities Entries

All reports use the entries from the Watermark Faculty Success Activities database to generate a Vita, Activity, or other types of reports. Reports used in Watermark Workflow processes such as annual reviews, promotion, tenure, or post-tenure review can be run by faculty at any time using the Reports tab in Watermark.

Dates used for Watermark Faculty Success Reports

All reports filter Faculty Success activity records based on a selected Date Range. Data from activities will only appear in a particular report if that an activity's associated date field(s) are included in the report's date range. All activity records include at least one date field option.

For completed activities, you may have single dates, a span or range of dates, or simply start date for each record. If a span of dates overlaps the Date Range period for a requested report, the record will be included. For most records, dates are straightforward; however, some aspects may not be intuitive:

- A record for a current/ongoing activity should only have the Start Date entered and leave the End Date blank.
- If an activity occurred on a single day, the date should be entered in the End Date field only and leave the Start Date blank.
- Dates must be entered in chronological order on the screen.
- If more than two dates exist in a record (i.e., you've entered the four possible dates on a publication record), the range will always begin with the earliest entered date of the record and end on the latest date.
- In most cases where multiple date fields exist (i.e., publications or intellectual property), you do not need to fill out all dates. The options provided by the multiple date fields are designed to allow you to record in-progress work within your data that will be included in reports covering that date range.

Rapid Reports in Watermark Activities

While most of this guide will cover the Reports tab, there is a simplified interface to run existing reports by clicking the Rapid Reports link in the upper right of the Activities tab. The resulting popup window lets you choose from the current list of available reports, set a date range for the activities that should appear in the report, and options for the file type created and downloaded if you click Run Report.

Where to Start

Logging into Watermark Faculty Success
1. Go to [Watermark Faculty Success](https://login.watermarkinsights.com/connect/samhoustonstateuniversity) (https://login.watermarkinsights.com/connect/samhoustonstateuniversity)
2. NOTE: You may receive a two-factor authentication (DuoSecurity) prompt to connect via campus Single Sign-On (SSO).
3. Click the Reports link in the upper left navigation bar.
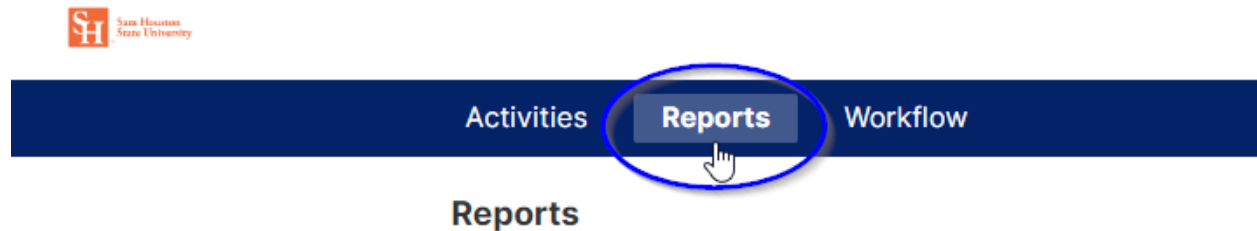
Select a Report
1. Click on a report name.
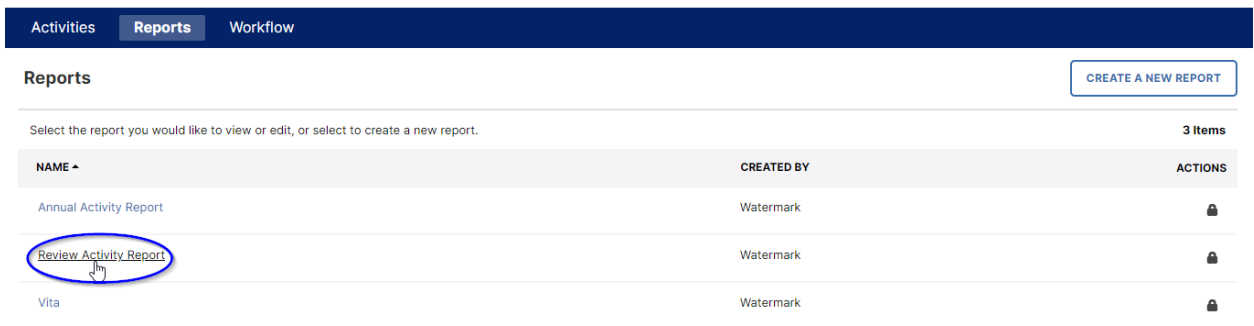
2. Choose the Date Range (Start and End Dates) of activities to be included in the report.

3. Choose the File Format (and page size when applicable) with Microsoft Word, PDF, and Web Page (.html) options available.

Run a Report

1. Once you have set the Date Range and File Format on the report click Run Report in the upper right.

This will trigger the creation of the report document in the specified file format and download a copy of the report file to the default Downloads folder of the browser. Depending on the browser and file format selected the downloaded report may open automatically in the associated application. In most browsers (Chrome, Edge, Firefox) you can access the Downloads folder from an icon on the toolbar in the upper right.
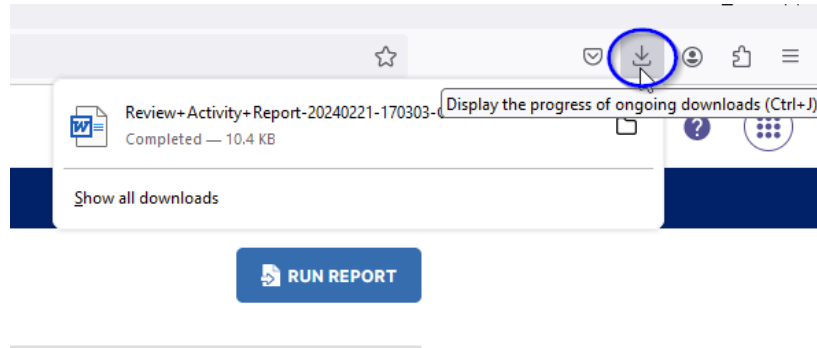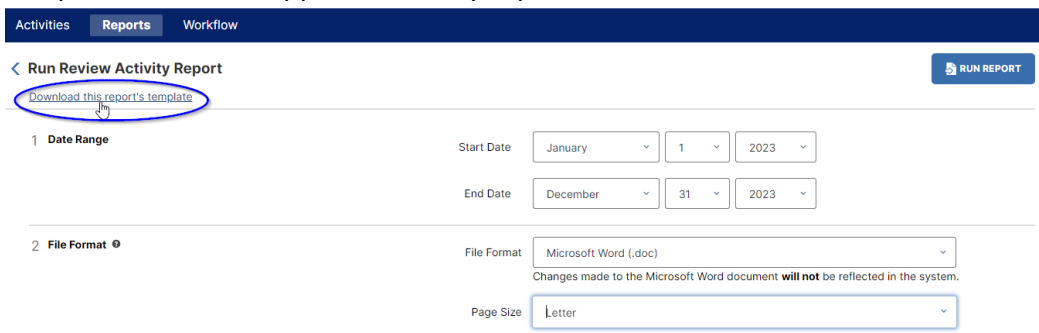
Here is an example in Google Chrome:
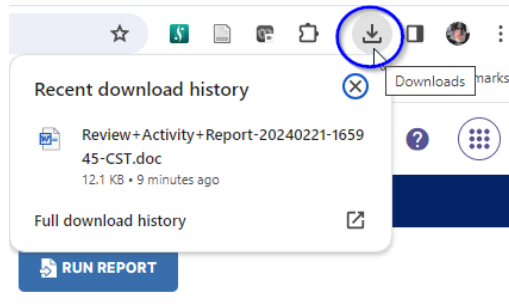
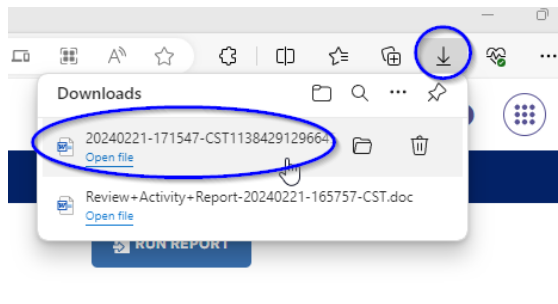Here is an example in Microsoft Edge:
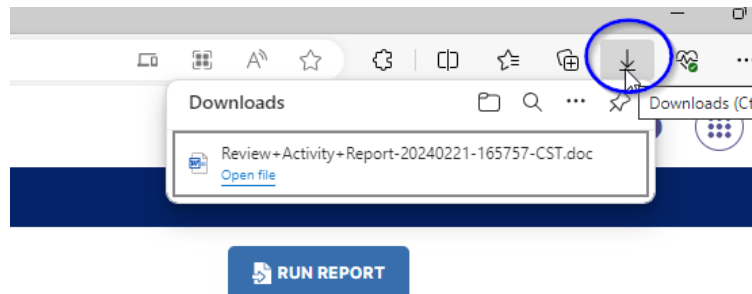
Here is an example in Mozilla Firefox:

2. You can view the structure of a report by clicking on the Download this report's template link in the upper left of any report screen.

This will also trigger a download of the template file in MS Word format to the default Downloads folder.

3. A report template will show the structure of the report, including the layout and display of the activities' Categories (i.e., General Information, Teaching/Mentoring, Scholarship/Research), the Screens within a Category (i.e., Degrees, Scheduled Teaching, Publications), and the Fields that are included under each Screen (i.e., Degree, Course Number, Authors/Editors/Translators.) The example shows part of the report template for the Review Activity Report:

Review 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 "
"]

Category

GENERAL INFORMATION

Workload Information
Screen: *Workload Information (Coming Soon)*
Items: First record

Teaching: [Teaching Workload Percentage]%
Research: [Research 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 or Single Activity Date: Month End Date or Single Activity Date: Day, End Date or Single Activity Date: Year]).

Awards and Honors
Screen: *Awards and Honors*
Items: All records

[Nominated for:] [Award or Honor Name], [Organization/Sponsor]. ([Date: Month Date: Day, Date: Year]).

Consulting
Screen: *Consulting*
Items: All records

[[Consulting Type] or [Explanation of "Other"]], [Client/Organization], [City], [State], [Country]. ([Start Date: Month Start Date: Day, ... Year - End Date or Single Activity Date: Month End Date or Single Activity Date: Day, End ... le Activity Date: Year]).

Screen

Degrees
Screen: *Degrees*
Items: All record
Criteria:
1. *Report Start Date* to *Repor*... e (dates must exist) overlaps with *Record Start Date* to *Record End Date* (dates must exist)

Field

[[Degree] or [Explanation of "Other"]], [Emphasis/Major], [Supporting Areas of Emphasis]. [Institution], [Year Completed].

Create a New Report

1. While in the Reports tab Click on the Create A New Report button in the Upper Right

Activities	Reports	Workflow		
Reports				CREATE A NEW REPORT
Select the report you would like to view or edit, or select to create a new report.				3 Items
NAME ▲			**CREATED BY**	**ACTIONS**
Annual Activity Report			Watermark	🔒
Review Activity Report			Watermark	🔒
Vita			Watermark	🔒

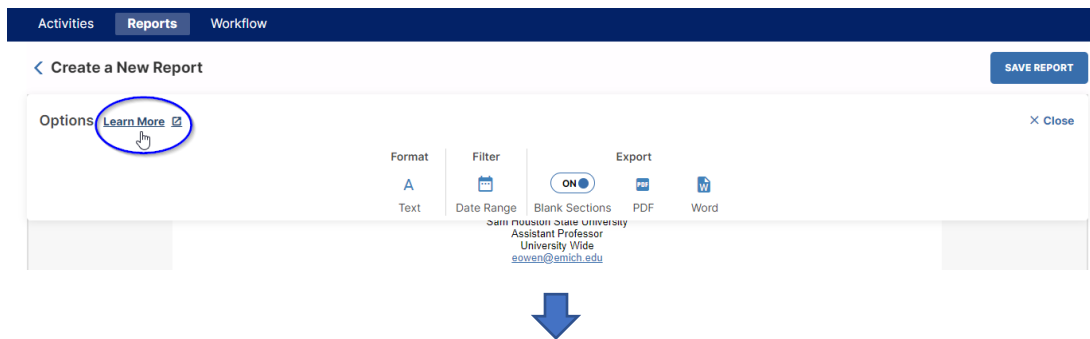2. Select a Report Style – for most users this will give an option for a Blank Document or a Vita (CV).

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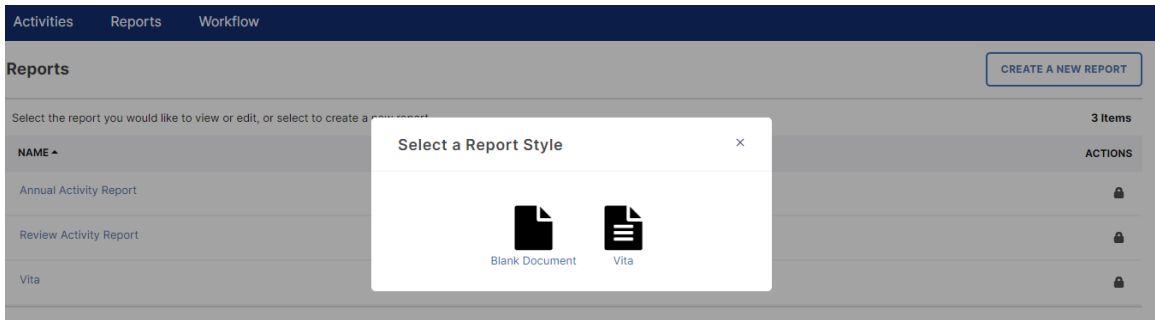
3. Whether you select the Blank Document (report) or Vita (CV) as the Report Style you will see the same Buttons on the upper right of the resulting screens: Save Report and Options.
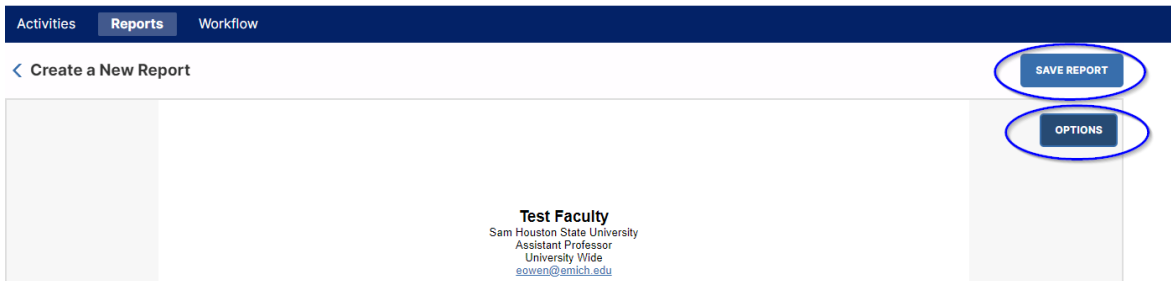
The Save Report button will be covered later in this guide.

After clicking the Options button on the upper left of the Options display there is a link to Learn More which will open another browser tab and display the Watermark Custom Reports guide. This guide provides a good overview of the ways you can preview, structure, and adjust reports based on your activities records. There is considerable attention given to the **Vita** report, and you are encouraged to review that guide for details on creating a customized **CV**.

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The other choices from the Options button provide formatting and exporting capabilities in reports. These include the ability to change parts of the overall Format of a report/CV. There is a Filter option if you wish to set a date range of activities to be included in a report/CV. There are three Export options for a report/CV: a toggle (on/off) whether to display Blank Sections of activities in a report/CV, as well as file exports links for PDF or Microsoft Word file types of a report/CV.
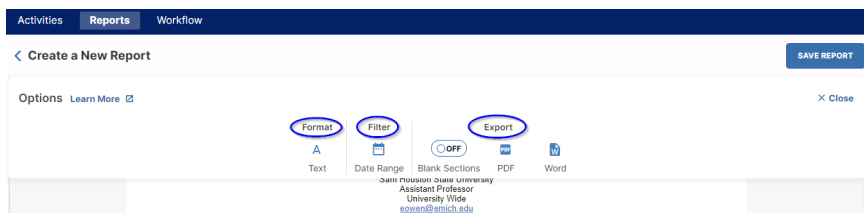

Clicking on the Format Option will open a partial screen interface on the right and provide drop-down menus with three choices for the Font (Arial, New Times Roman,

Courier New) which can be applied separately to the Section Heading and Section Body portions of a report/CV. There are also six Heading levels where text at each level can have formatting like bolding, italics, or underlining applied (currently applied formatting is highlighted in blue), as well as alignment (left, center, right), and outdents and indents of text. Finally, there are a few format options for Table Headings if a tabular display style is selected. Once you have chosen the desired formatting options click the Save button at the bottom right. If you don't want to make any changes, click the X at the top right of the Format partial screen interface.
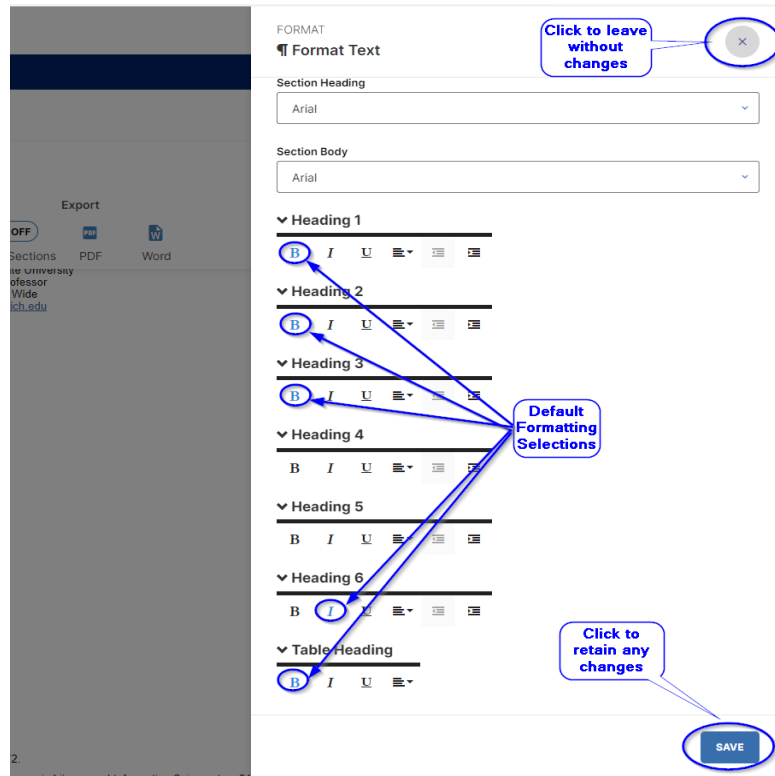
Clicking on the Filter option will open a partial screen interface on the right and provides a check box to include All Dates, which is checked by Default. If the check box is unmarked, it allows the filtering of activities in the report/CV only if they match the Start Date and/or the End Date. The Date Range can be open ended, all activities on or after a Start Date, or all activities on or before and End Date, or a closed range with both start and end dates. There is also a toggle to either Include or Exclude any Undated Activities (this is toggled to Included by default.) Once the desired Date Range has been entered click the Apply button at the bottom right. If you don't want to make any changes, click the X at the top right of the Filter partial screen interface.
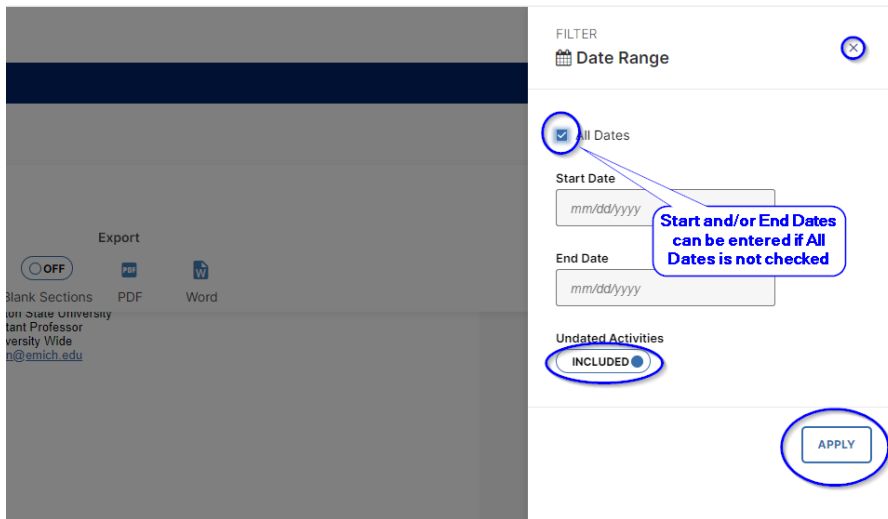
The Export options for a report/CV allow a download of the report/CV in either PDF or Microsoft Word file types. There is Blank Sections toggle (on/off) that determines whether the exported report/CV will display Activity Sections if there no activities either exist, or match the date range or other filtering criteria. The toggle is set to off by default.

Here is an example showing a PDF export with the Blank Sections toggled **Off**

Versus here is an example showing a PDF export with the Blank Sections toggled **On**

Clicking on the Blank Document style allows you to create a customized report with a layout that will only include activities you have selected. The Blank Document's default display includes some information pulled from your Personal Details: Name, Institution, Rank, Department, and Email Address. In addition, there you will see a single Section Heading, which you can edit or delete, as well as buttons to Add Activities, Add Text, and Add Section
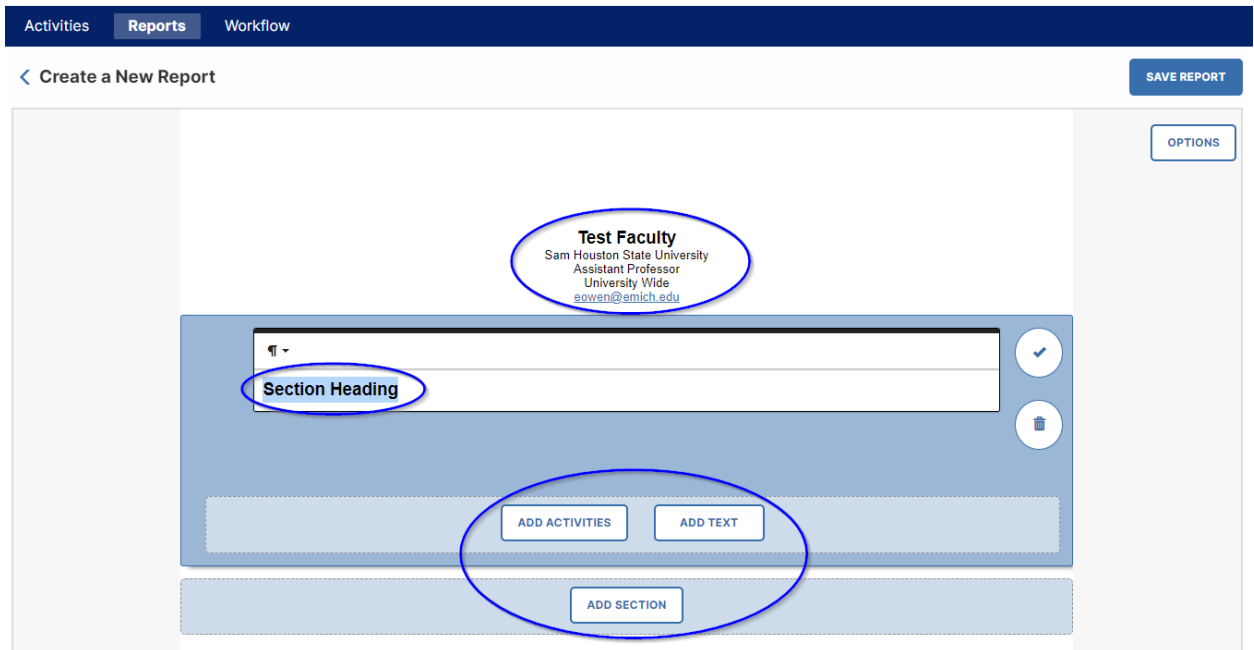
You can make changes to the Section Heading (in the example it has been renamed to Service) and then click on Add Activities to view a drop-down menu of all Activity Types information from the activities' screens (in the example University Service has been selected)
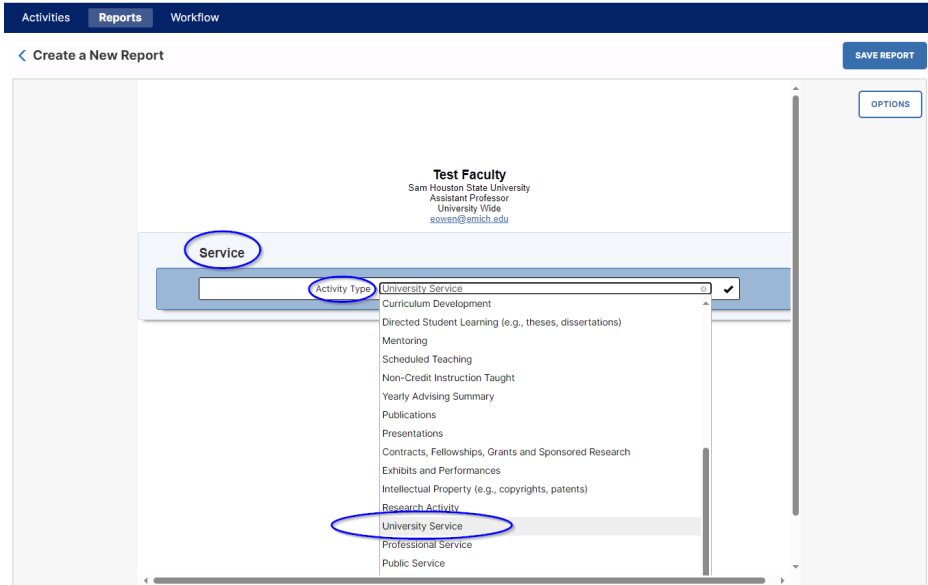
Once an Activity Type has been selected you click the check ☑ mark and your entries from that activity screen will be displayed in the default Display Style. There are several ways you can choose to display your entry information, depending on the type of activity and the fields of associated data.
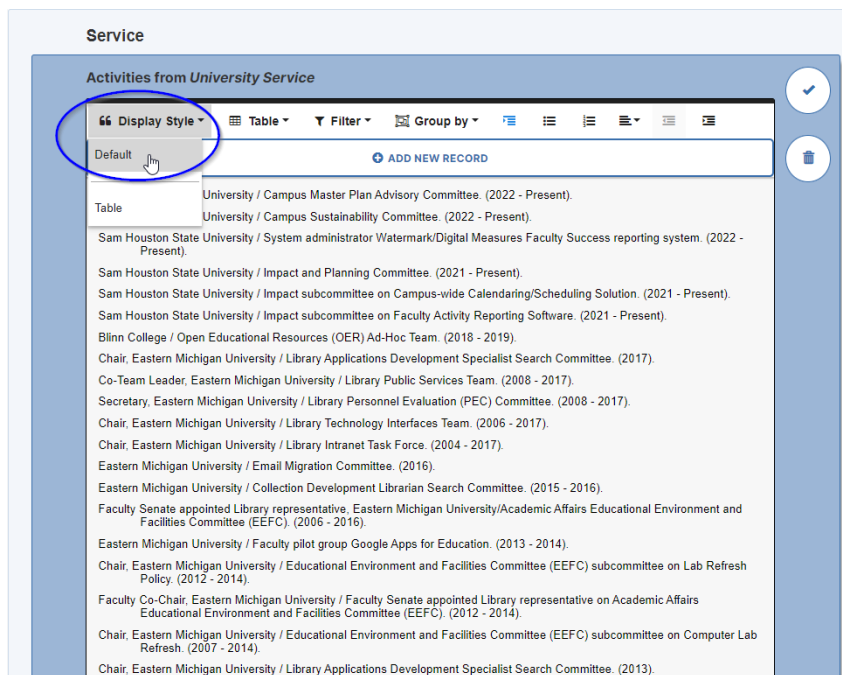
The Display Style also has a Table view for most types of activities. This style creates a tabular layout of selected fields from the chosen activity screen. You can change the fields to display by clicking on the Table drop-down tab which is highlighted in blue. Th

drop-down menu will list all fields for the Activity Type, and you can click on the checkboxes to the right of a field to have it included in the Table display style.
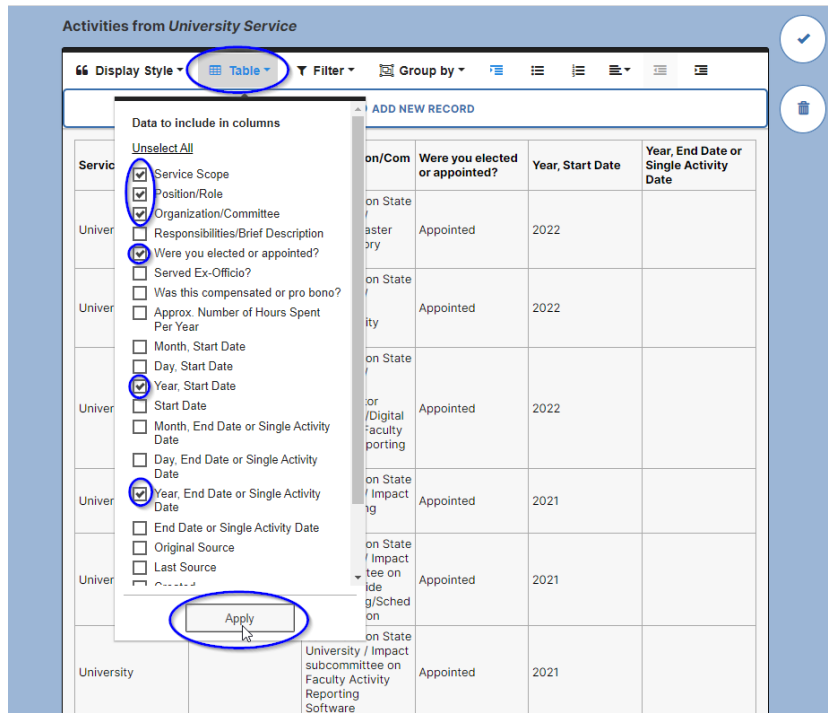
NOTE: When including the Activity Type from Publications the Display Style provides numerous Citation styles for use in listing the bibliography of records in the Publications activity.
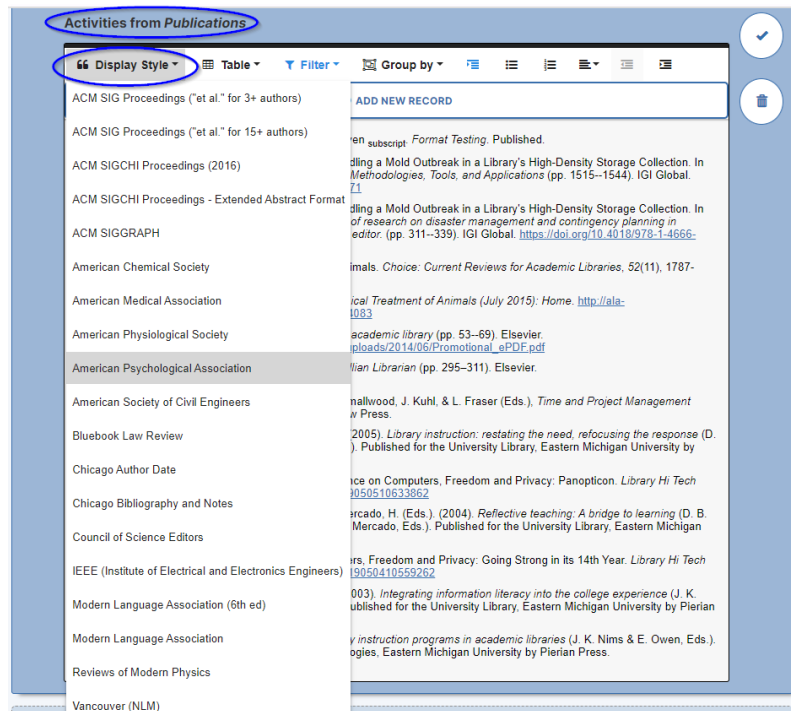
In either Display Style (Default, Citation, or Table) you can apply a Filter by clicking on the Filter drop-down tab. The filtering options are based on applicable fields in the Activity Type. You can check boxes to add filtering criteria to the display. In the example a Table view of University Service activities has been filtered to only display those entries that included the Elected status for the Field "Were you elected or appointed?"
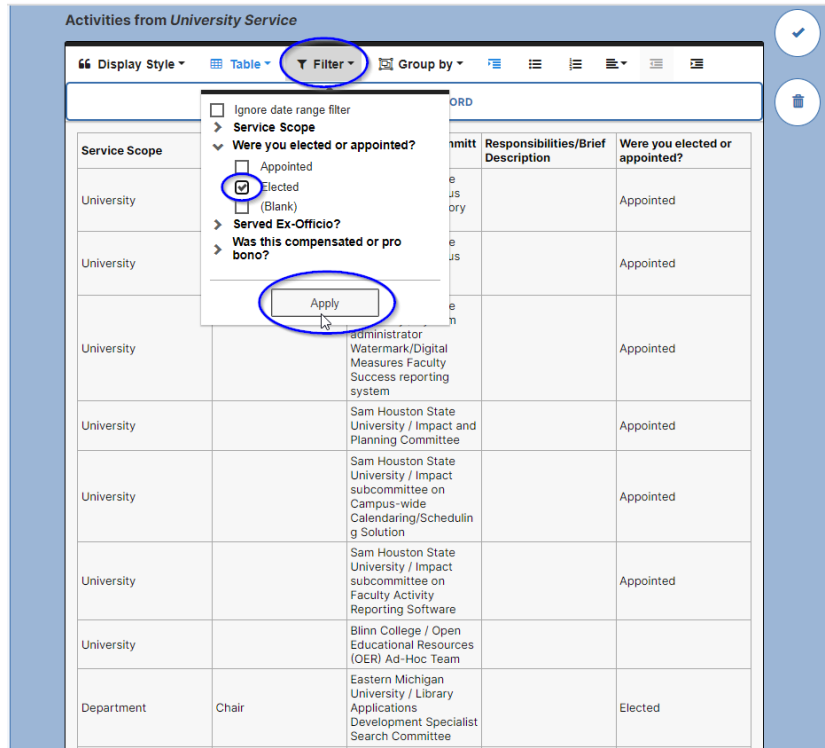
In either Display Style (Default or Table) you can also group entries based on applicable fields in the Activity Type. You select from the Group by drop-down menu to choose a field as your grouping criteria to the display. In the example a Table view of University Service activities, filtered to entries that included Elected status, are grouped by Service Scope

All tabs with display criteria currently being used will be highlighted in blue text. Other display tabs include Hanging Indent, Unordered list, Ordered list, Align (left, center, right), Outdent, and Increase Indent. In the example activities from University Service are in the in the Default Display, Filtered to only display Appointed positions, Grouped by Service Scope, and placed in Unordered lists.

Editing and Adding Activities within Reports

1. While you are creating a New Report you can also edit existing entries in your Activities records and even add new records into the currently displayed Activities Screen.

   To edit an existing record, you can click on the edit icon to the right of the entry. This will open a partial screen editing interface containing all of the fields for the chosen entry. In the example an edit screen for a university service entry is displayed.
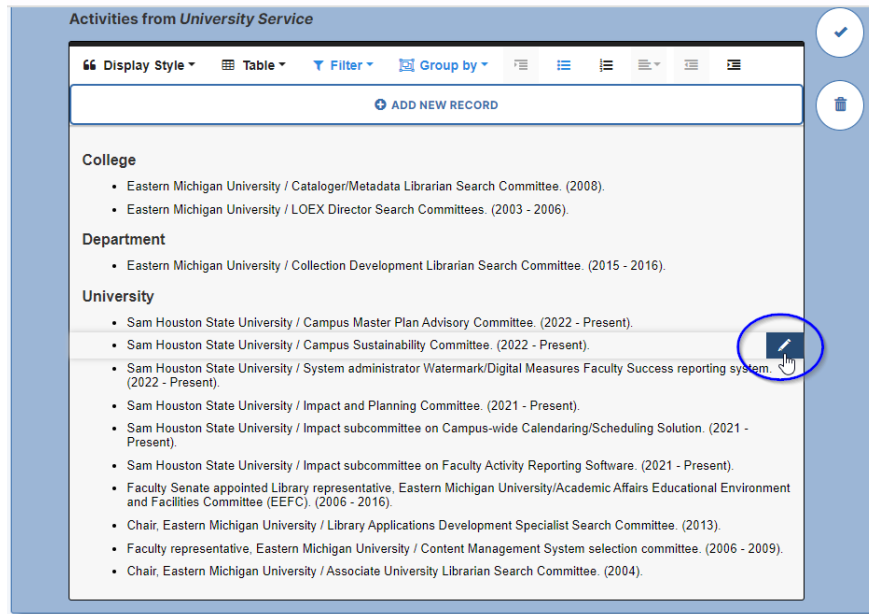
2. Once you have made the desired edits to the activity record you can Save the changes by clicking on the Save button at the bottom right. In the example an End Date Year has been added for this record.
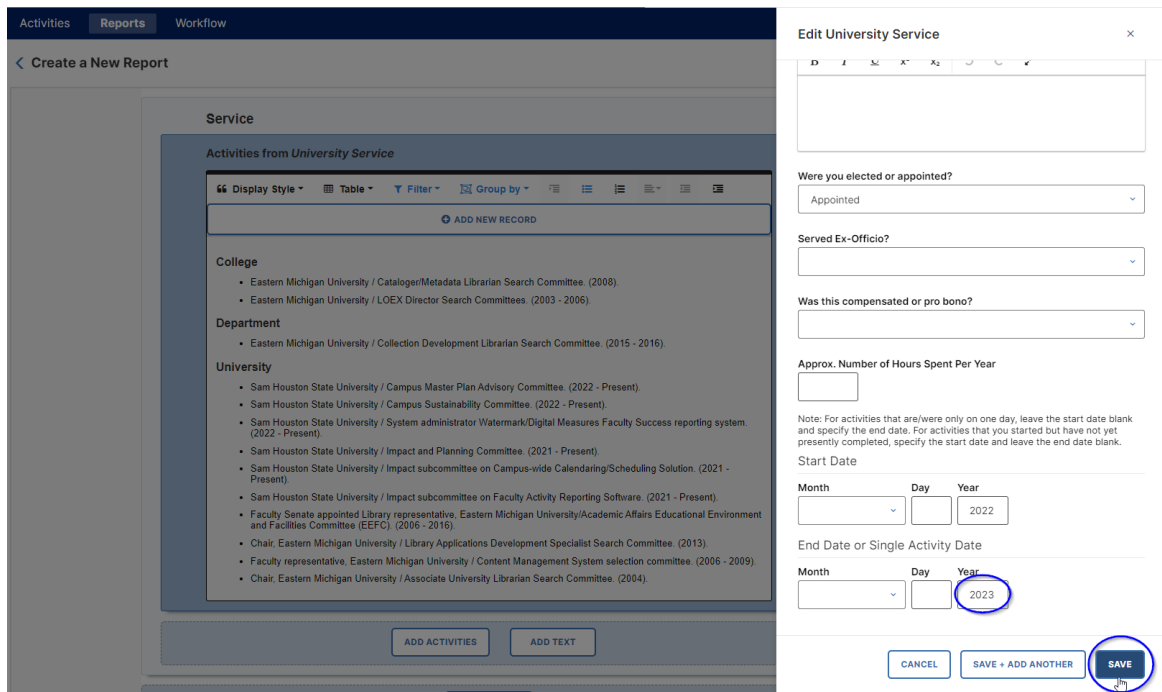
3. While in the Edit record interface you can click either the X at the top right of the partial screen or the Cancel button at the bottom left to leave the record unaltered. The other option you have is the Save + Add Another button at the bottom center.
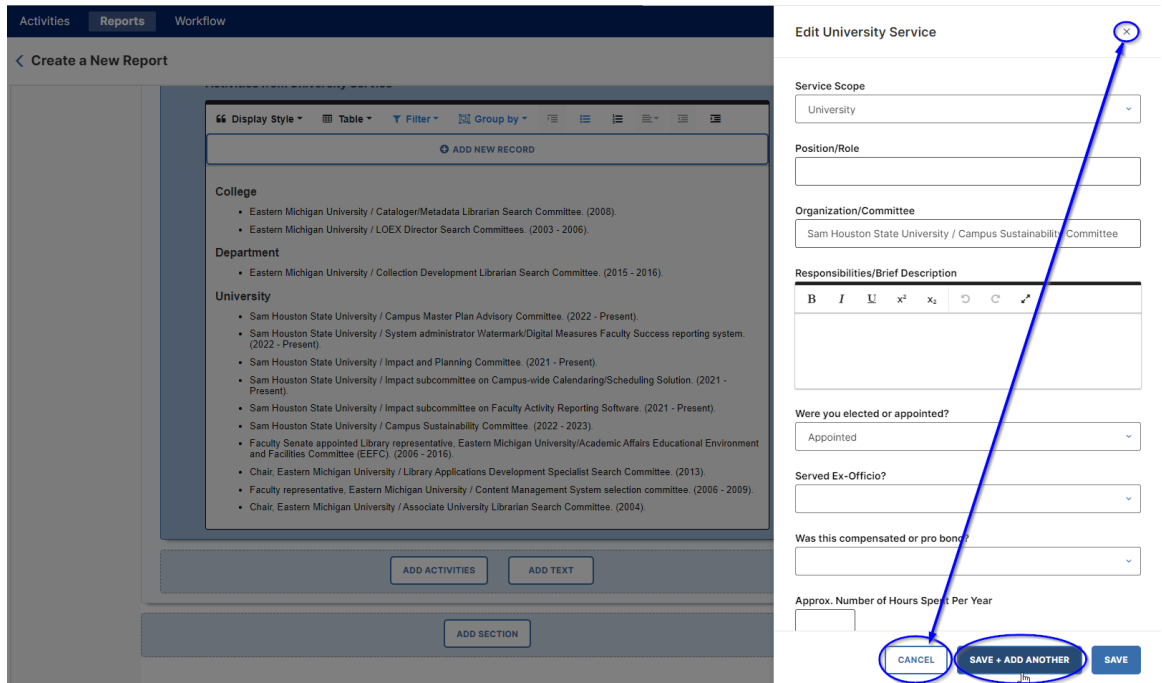
4. If you click either the + Add New Record link near the center top, or the Save + Add Record on the Edit screen you open a partial screen interface with blank fields for the selected activity type. In this example a new University Service record can be entered by selecting/filling out the applicable fields.
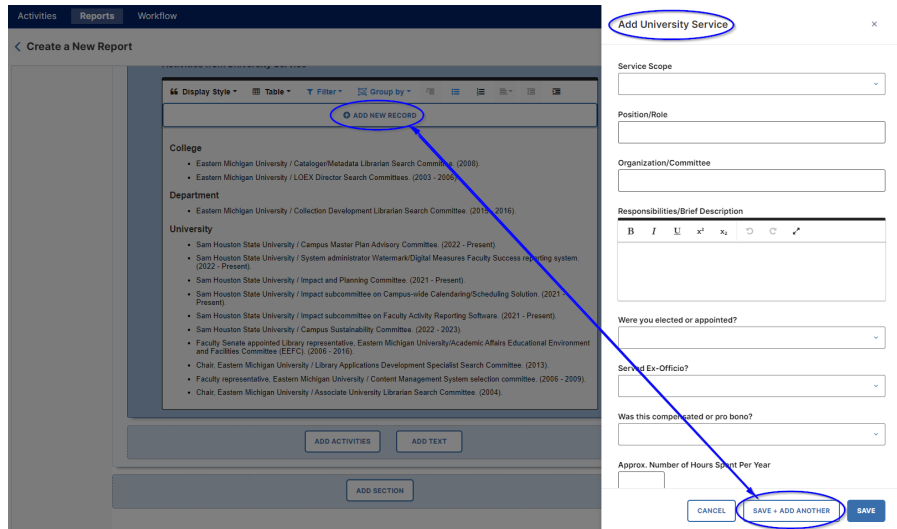
NOTE: These Edit and Add Record options allow you to make corrections and additional entries as you are refining the look of a report or CV.

5. Once you are satisfied with the display and formatting of this section of the new report you can click on the check button in the upper right to save the section, the trashcan button to delete the section, or one of the three buttons below the current section: Add Activities Button, Add Text, and Add Section to continue to build the report.

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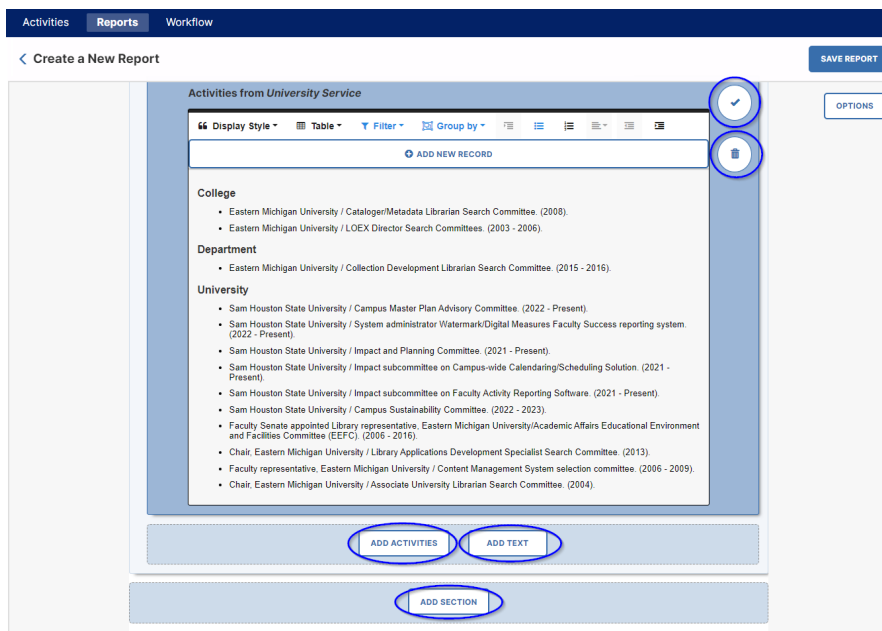
6. Clicking Add Activities will allow you to bring another selection of records from an additional Activity Type under the current section heading.
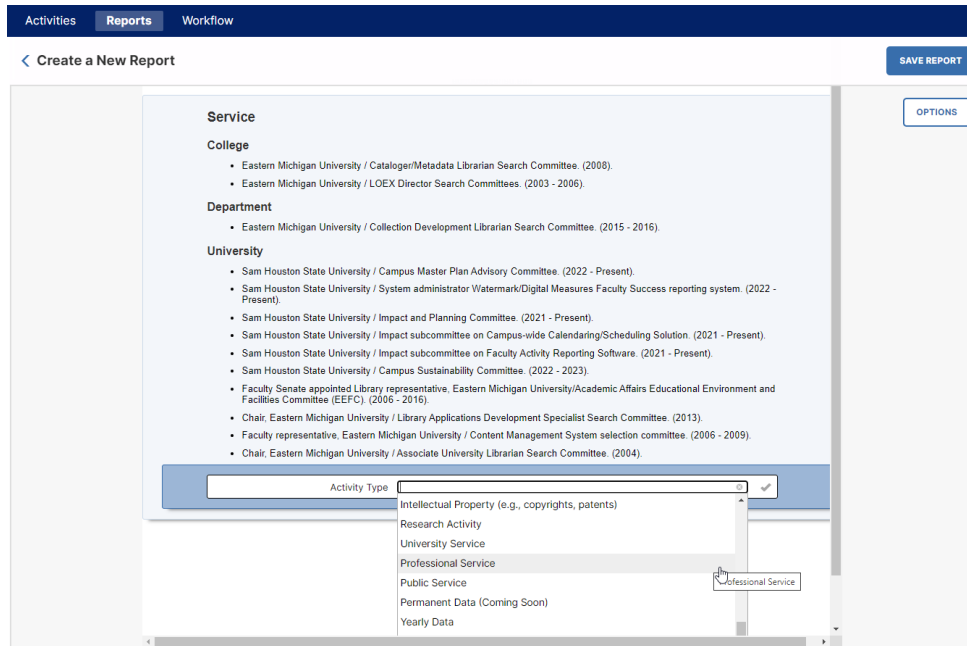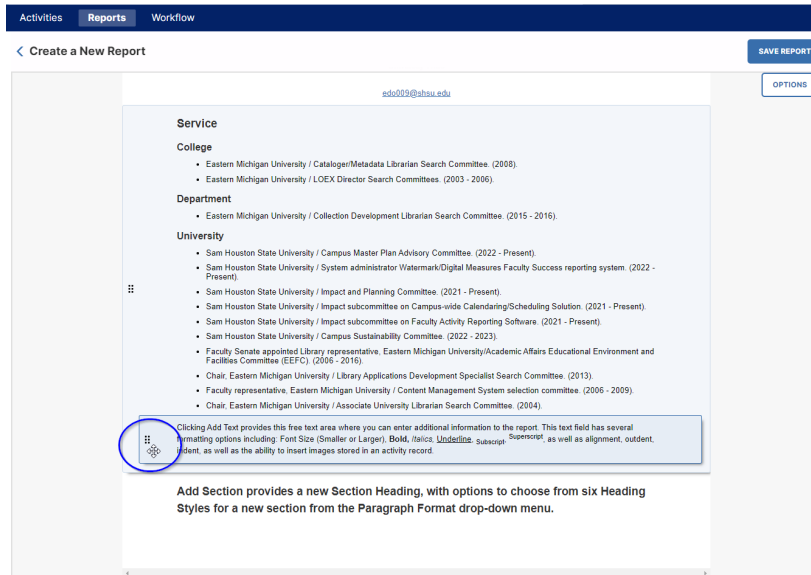

7. Clicking Add Text provides a free text area associated with the current Section where you can enter additional information to the report. This text field has several formatting options including Font Size (Smaller or Larger), **Bold,** *Italics,* Underline, Subscript, Superscript, as well as alignment, outdent, indent, as well as the ability to insert images stored in an activity record.
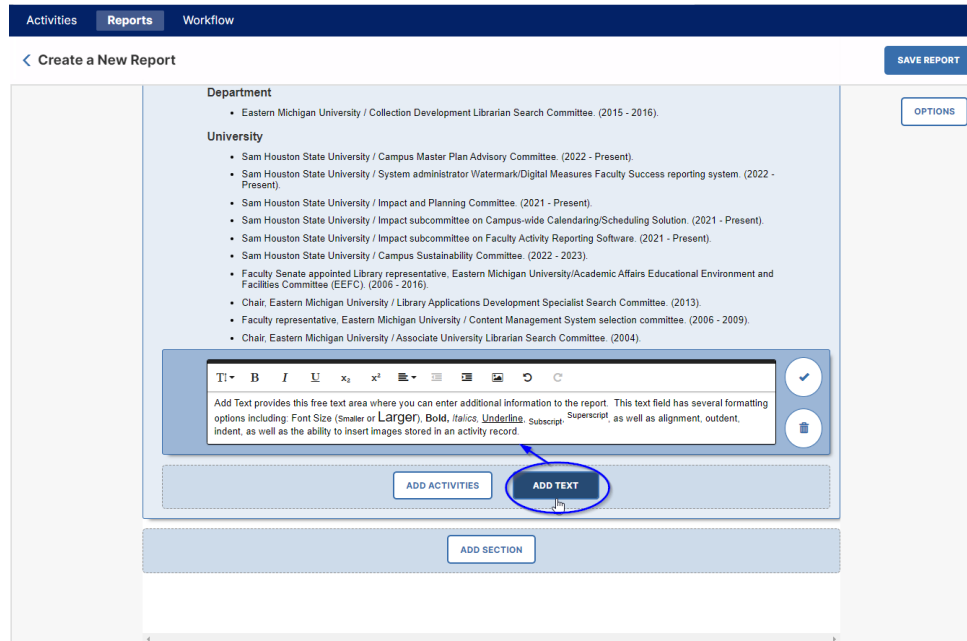
8. Clicking Add Section provides a new Section Heading, with options to choose from six Heading Styles for a new section from the Paragraph Format drop-down menu.
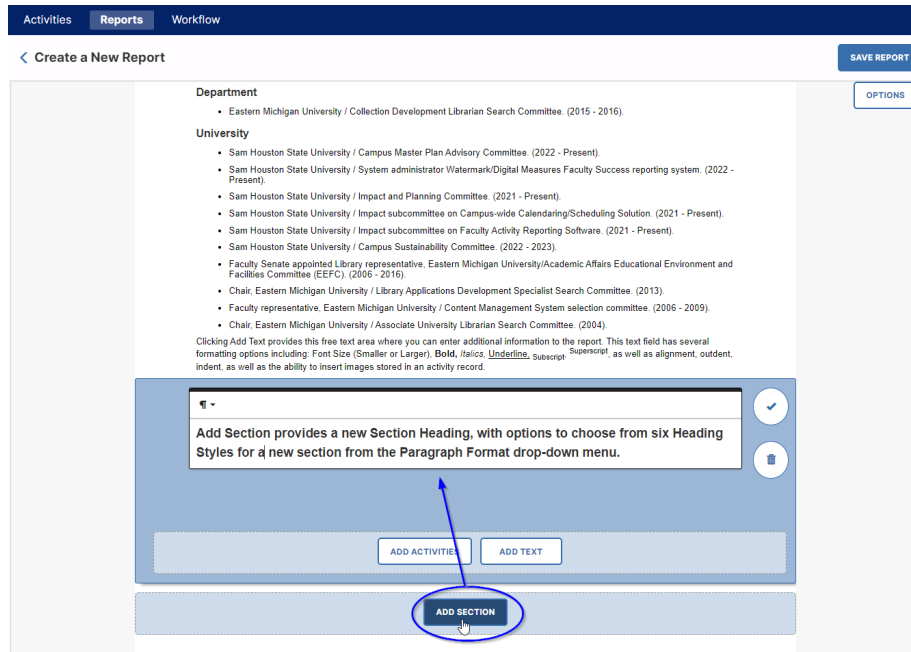
9. You can drag and drop elements (activity type or added text) within (and between) Sections by hovering over an element then click, hold, and drag the element to a new location. You will see a directional cross icon when you are hovering over a location where you can begin to move an element. Drag Element Here text will appear in locations where an element can be dropped. In the example the Added Text Section is moved to the top of the Service section.

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Saving a Report

1. Once you have completed designing and populating a new report/CV you can click Save Report in the upper right. A pop-up window will appear for you to enter a name for the Report, with Cancel and Save buttons as options to name the report.
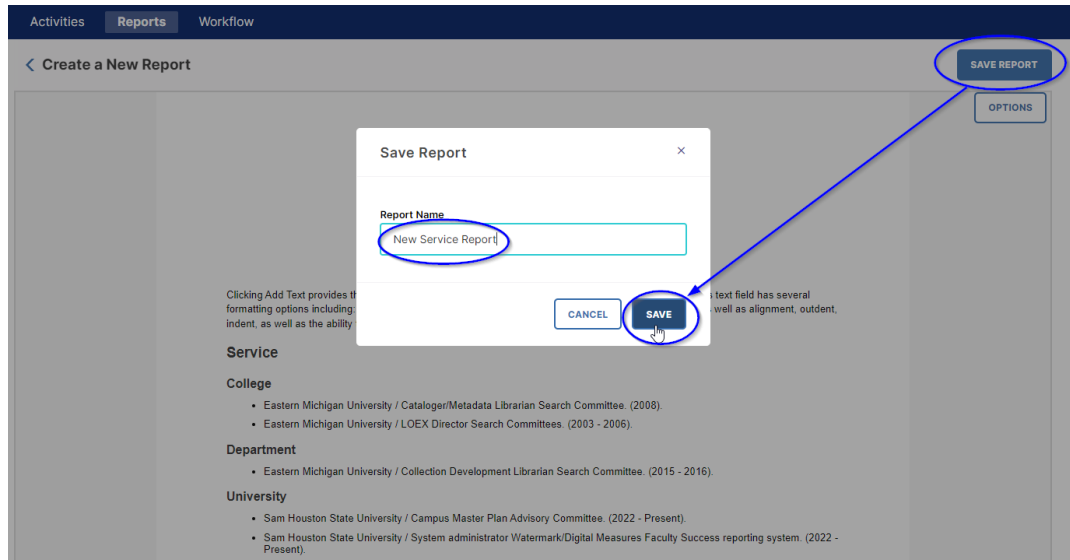
2. Any reports you create and save will now appear on your list of Reports. You can use the drop-down menu to the right of the report to Delete, Duplicate, or Rename a report you have created, or can edit. Reports created by Watermark will have a lock icon to the right and cannot be altered on the list of available Reports. You may also see reports created by SHSU administrative accounts that can be shared with individuals or groups of faculties associated with a department or college. In the example the New Service Report has been added to the list and can be altered since it was created by your account.
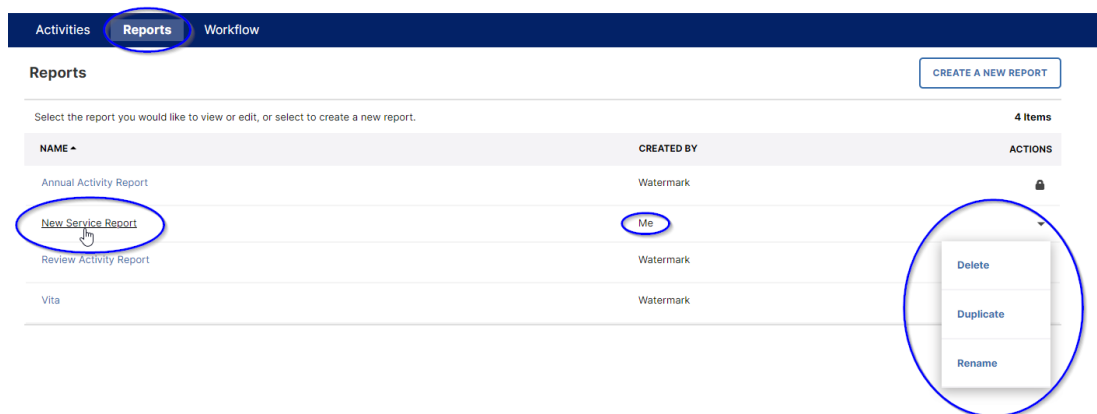
See SHSU [Watermark Faculty Success Training and Resources](https://www.shsu.edu/dept/academic-affairs/watermark/training.html) (https://www.shsu.edu/dept/academic-affairs/watermark/training.html) page for additional assistance in entering and maintaining your faculty success activities data.