Faculty Activity System (FAS) User Guide

.::Digital Measures

Welcome to Digital Measures!

Digital Measures Activity Insight (hereafter referred to as Faculty Activity System or FAS) is a fully customizable online information management system designed to organize and report on your users' teaching, research, creative and service activities. Hundreds of campuses in more than twenty-five countries use FAS to manage critical information for accreditation and personnel management. It provides the most reliable, versatile, and secure solution for generating custom reports easily and in real time.

FAS eliminates the time-consuming and often tedious task of gathering and compiling data to build reports, saving your campus time and effort by eliminating the need to prepare users' activity reports manually. From customized report generation for accreditation and campus stakeholders, to keeping users' profiles current on your campus' external website, FAS enables your campus to focus on using reports instead of preparing them.

Once you have entered data into FAS, anyone to whom you give access can generate reports. Reports can be prepared in most formats and configurations necessary. FAS is accessible at any time, day or night, from anywhere you have an Internet connection.

Benefits to Users

FAS eliminates periodic, recurring requests for information on users' teaching, research, and service activities. Users can generate reports for personnel review procedures such as promotion and tenure, or reports for other stakeholders such as faculty rosters, biographical sketches and vitae once FAS contains their activity data. Faculty gain a single convenient easily accessible place to maintain their activity data and generate these reports. You can also link FAS to your campus's website, ensuring that profiles of your users are always current.

Benefits to Administrators

Administrators need timely access to users' activity reports for accreditation; your state institutional research surveys' personnel review procedures, such as promotion and tenure; program reviews; and other stakeholders. FAS gives administrators an efficient, centralized, easy-to-navigate source for generating reports on these data. With FAS, you are more aware of your users' activities and better positioned to publicize their accomplishments because of this awareness.

Security, and Backup and System Requirements

The following security measures are in place for Digital Measures' servers and datacenters:

- All data are transferred over an SSL-encrypted connection.
- Server rooms are locked, caged, and protected by armed security guards present at all times.
- Servers are firewalled and located behind an intrusion detection system.
- Redundant fire suppression and climate control systems are used at all times.
- Redundant power and Internet connections are enabled.

In addition to these server security measures, Digital Measures also performs secure nightly backups to five geographically dispersed locations. In addition to these backups, you are able to download a full copy of all your data at any time.

Access to Data

Faculty will only have access to their own data. Department chairs, deans, assistant deans, etc. will have access to their department's faculty data as well as their own.

Logging In to Faculty Activity System (FAS)

Log in using your University of Oklahoma 4x4 and password at the login link located at http://www.ou.edu/provost/faculty-activity-system , links located on your college homepage and at one.ou.edu. For more information, please visit the campus FAS website: http://www.ou.edu/provost/faculty-activity-system.

Overview of Faculty Activity System
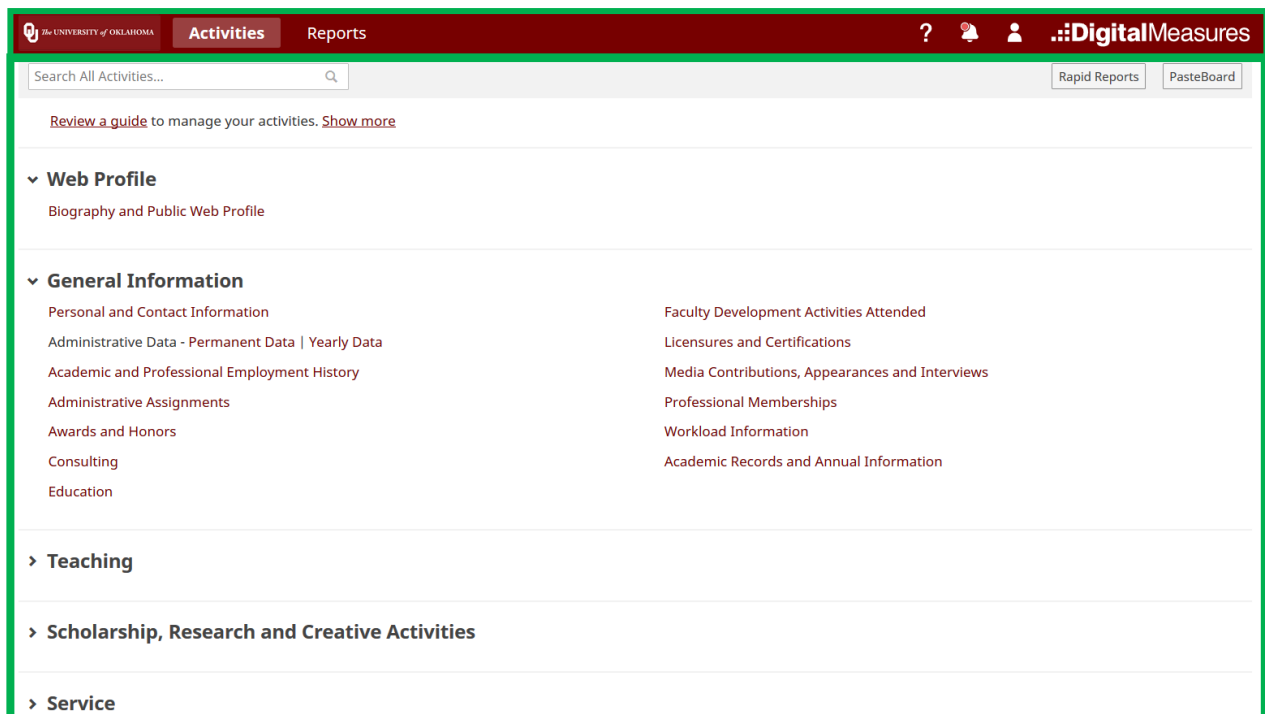
FAS is made of many different components, all of which share common basic elements (see above):
1. The Navigation bar for FAS (described below)
2. Main content for each utility, each of which we describe briefly in this chapter

Navigation Bar

The Navigator Bar is on all FAS screens and contains the basic navigation links. The main buttons will provide the following functionality, described briefly in the following pages and in more detail in the remainder of this guide:

> **Note**: You may not have all utilities displayed or functionality described here. Navigator bar options are dependent upon the permission assigned to your FAS security role.
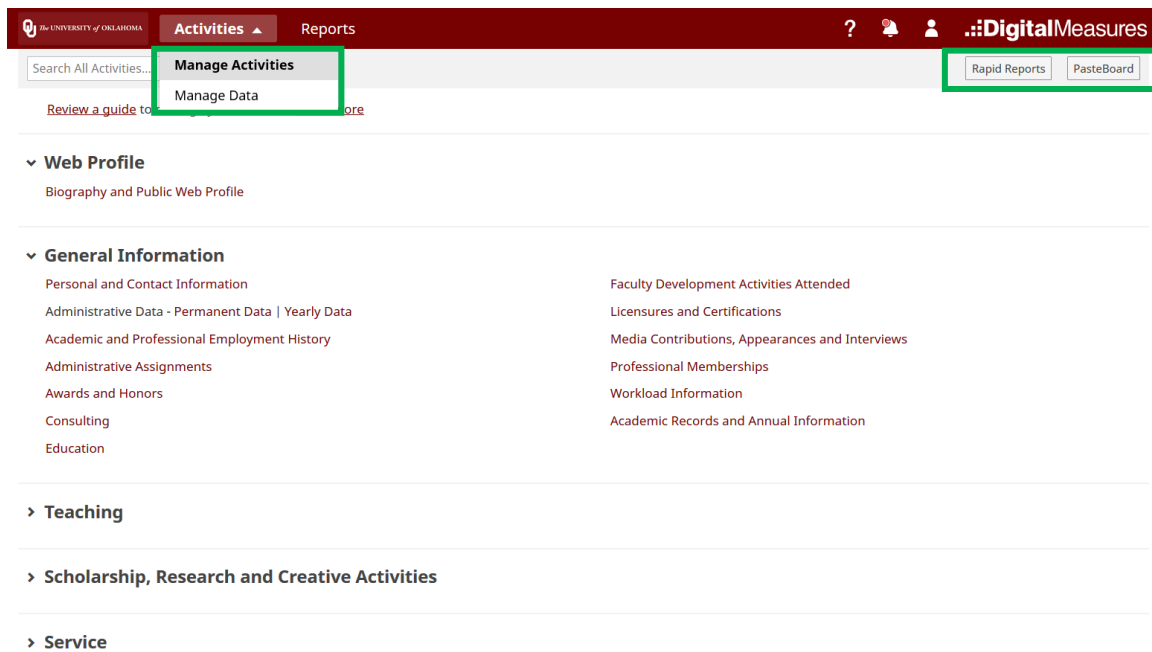
- **Activities:**

    Manage Activities: Enter or manage your own teaching, research, creative and service activities.   **Note**: In the system you will be adding records/activities creating a historical record over time.

    Manage Data: Enter or manage other users' teaching, research, creative and service activities.

- **Reports**: Run customized reports based on the information entered into Activity Insight. Those with higher level permissions will be able to 'Create a new report' and choose from parameters available.

- **Workflow:** The Workflow button will be available when an active workflow task has started.

- **Help**: Send a question or provide feedback directly to the University Administrator for FAS.

- **Notifications**: A red dot will appear on the bell when you have a message.

Activities

The Manage Activities utility, showing the types of activities.
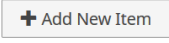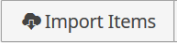
The Manage Activities utility enables users to keep track of their own teaching, research, creative, service activities and select items to populate a web profile.

On the top of the Manage Activities page is a link to a universal Faculty Guide that Digital Measures maintains. Click "Review a guide" to access this information. Clicking "Show More" will bring up a link to the University FAS website.
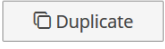
The Manage Activities page includes links to each of the data collection screens in your system.

When you first visit this screen, it would be good to spend a few minutes looking through the screens accessible from it. To access a screen, click its name. The resulting summary screen displays records that are stored for that screen.

There are four possible actions you can take from the resulting summary screen, although not all of these actions will always be available:

- To add a new record, select the ⊞ Add New Item button.
- To import items in bulk, select the ☁ Import Items button (available only for the Publications screen).

- To delete a record, select the appropriate check box, and then select the 🗑 button.
- To copy an existing record, check the box to the right of the name and select the ⧉ Duplicate button.

  Note: Read-only records that you can view but not edit or delete have been added to the system on your behalf by the University Administrator. If such records need revision, please contact your college staff representative or FAS University Administrator at activity.insight@ou.edu.

Rapid Reports and the PasteBoard can be opened by clicking on the feature name located on the top right of the screen.

An additional feature available through Manage Activities or Manage Data is Import Items. See page 12 under Publications for more details on that feature.

Saving Records

When working in the system, it is important that you preserve modifications by selecting the 🖫 Save button located at the top of the screen. If you attempt to navigate away from a screen containing unsaved changes, a warning message will display to determine whether you would like to return to the screen and save your modifications before proceeding.

Expanding Text Boxes
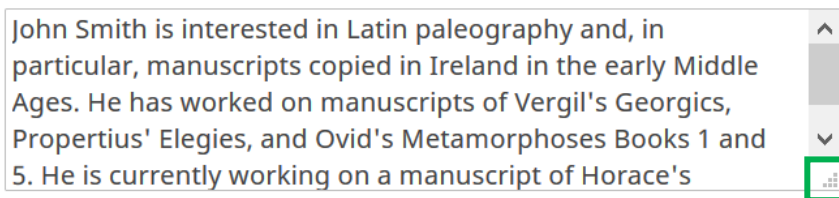
You may see a triangle under the scroll bar of the text box. Clicking and dragging this triangle makes the text box larger to give you more space. Once expanded, it can be minimized by double clicking the arrow again.

Rapid Reports
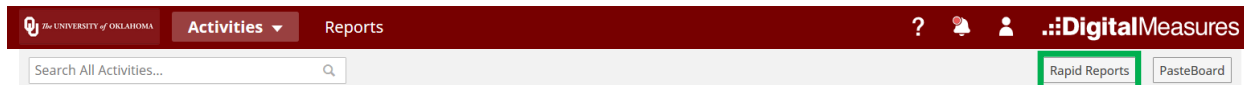
The Rapid Reports feature provides a way for you to run custom reports quickly and easily on the data in FAS. By enabling you to run reports from the same pages into which you enter data, Rapid Reports gives you the flexibility to see the effect the data you enter has on your reports easily. You can use Rapid Reports when managing your own data or when managing data for others. If you are managing your own data, the Rapid Reports feature will return the selected report with just your data. If you run a report using Rapid Reports while managing another user's data, the report will contain that user's data. Rapid Reports will default to the most-recently-run report parameters.

> **Note:** Rapid Reports and PasteBoard only work in browsers that support widgets. Browsers that support widgets include Internet Explorer for PCs, Mozilla Firefox, Google Chrome and Apple Safari.

PasteBoard

The PasteBoard enables you to copy up to 4K (4,000 bytes) of text from another document, such as your vita in Microsoft Word, and paste it into the PasteBoard. After you have pasted text into the PasteBoard, you can then select text from it, click-and-hold on the text you selected, and drag it into a system field to paste it into that field. As long as no more than 4K of text is in the PasteBoard, the text entered there will be maintained as a user moves from screen to screen or even between utilities within FAS.

If users report difficulties using the PasteBoard, there are several common troubleshooting tips you should implement. Instruct the user to:

- Clear their browser cookies and restart their browser
- Verify that nothing is blocking the storage of cookies for the browser they are using

- Ensure that too much data is not being pasted into the PasteBoard – remember the 4K size limit
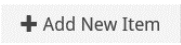
Unicode Compliance

You may copy and paste special characters – such as Greek or Latin characters, accent marks or other diacritical marks – into FAS from another source, as long as they are Unicode-compliant. Unicode is an industry-standard set of characters that allows computers to consistently represent and manipulate text expressed in any of the world's writing systems. For more information about Unicode, please see: http://www.unicode.org/faq/basic_q.html.

Examples of fonts that are Unicode-compliant include Arial and Times New Roman. Examples of fonts that are not Unicode-compliant include Symbol and Wingdings. If characters are not transferring to FAS as you expect, try changing their font in the source software application to Arial or Times New Roman and then copy and paste the text into FAS. For characters typically entered as symbols, you may need to change the underlying font of the character, in addition to the display font. To do this in Microsoft Word, navigate to **Insert > More Symbols**, and update the font of the symbol to a Unicode-compliant font prior to selecting and inserting the desired character. This ensures that the underlying font *and* the display font are Unicode-compliant, and that the symbols render correctly in FAS.

> **Note**: Mac and PC versions of Microsoft Word often differ in how they convert special characters when switching to a Unicode-compliant font. The PC version of Word will copy special characters as images, which means you cannot transfer them into FAS unless you replace them with symbols in a Unicode font. Defining the font for the symbol separately from the font of the text, as defined above, becomes important. The Mac version of Word converts the special character to a matching special character in the Unicode-compliant font, allowing you to transfer the character into FAS.

Publications

Publications can be added by clicking on [Import] or [+ Add New Item] button.

Publications – Import Items
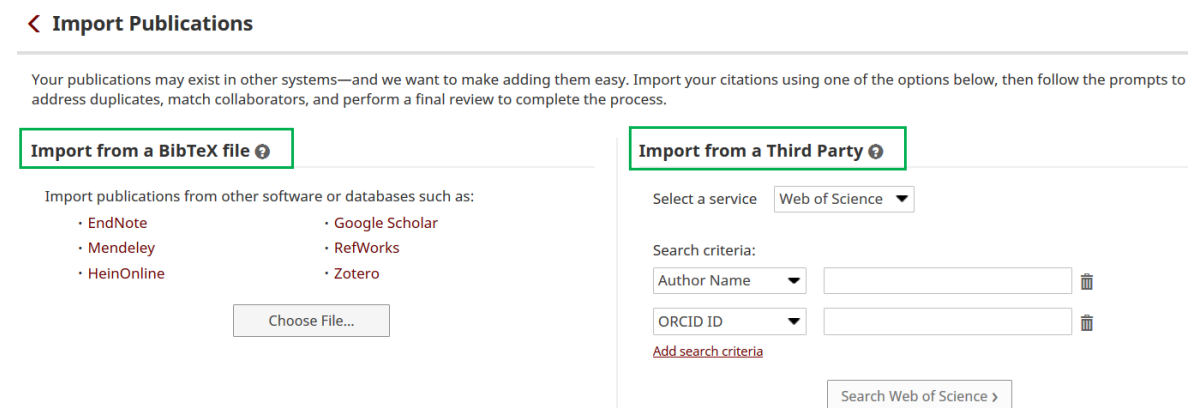
Import from a Third Party allows for direct import publication citations from Web of Science, Crossref, ORCID, and PubMed, as Digital Object Identifier (DOI) registration agencies for scholarly and professional publications with a database of more than 80 million intellectual contributions including journals, books and other types of content. Simply provide the needed information in search criteria, select the needed citations (a) and import via FAS Import Publications screen.

Import from a BibTeX file by creating a BibTex file already stored in another software system such as a reference manager or database — for example, EndNote, Google Scholar, Mendeley, RefWorks, Scopus, or Zotero. Those software systems enable you to pick records and then export them into a BibTeX file.

BibTeX is the most broadly supported standardized way to structure publication citations in a file. This makes it easy to move citations between two software applications. You export citations from one software application into a BibTeX file

and then import that file into another software application. In this case, you are exporting from another software application and importing into FAS.
This feature enables you to upload an exported BibTeX file so that you do not need to rekey those citations.

Step-by-step directions for importing items can be found by clicking the ![icon] *icons found on the Publications - Import Items screen.*

Note: All publication items entered must have the peer-reviewed/non-peer-reviewed text box selected after importing.

User Guides for Direct Import and BibTeX Imports

Publications – Add New Item

Publication information can also be added by selecting the ![Add New Item] button.

When adding a publication the faculty account owner will automatically show up as the first author. To add a collaborator click on the Add button, then select a university collaborator from the People at The University of Oklahoma drop down menu **or** add the collaborator name in the First Name, Middle Initial and Last Name fields. If you select a collaborator from the People at The University of Oklahoma dropdown selection this will link the publication records. To change the order of authorship click on the arrow up/down buttons located on the far right.

> **Note:** The peer-reviewed/non-peer-reviewed and publication status fields are required.

Reports

Faculty reports

Reports

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

Name ▲
Academic Records
Annual Faculty Mini Vitae
Attachment Report
NIH Biographical Sketch
NSF Biographical Sketch
Scheduled Teaching by Faculty
Vita
Web Profile Review

Administrative reports

Reports

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

Name ▲
Academic Degrees Earned
Academic Records
Annual Faculty Mini Vitae
Attachment Report
Awards and Honors
Creative Works by Faculty
Editorial and Review Activities by Faculty
Faculty/Staff Directory
General Service by Faculty
Grants and Sponsored Research (ORS)
NIH Biographical Sketch
NSF Biographical Sketch
Presentations by Faculty

Not all available reports are shown in the above examples.

Reports use a template-based reporting utility that eliminates the drudgery of creating reports by digitizing the process. Digital Measures uses the specific data elements, calculations, and formatting you specify to construct standardized reports which your administrators and faculty can then run on the activity data in your instrument.

To run a report:
1. In FAS, select Reports from the top Navigation Bar and select the report you wish to run. **Note:** To download a report's logic template showing how the report you selected is built, click on "Download this report's template". This is helpful if information is missing from your report. The details of how the report is built will show what fields are included in the report and give ideas on where to find the area with no data.
2. Select the desired date range of the report.
3. Select the report file format and page size.
4. Click on ⎙ Run Report located in the upper right of the screen.

To build a customized report:
1. Click the Create a New Report button

2. Select the desired format.
3. Format report as desired.

Web Profile
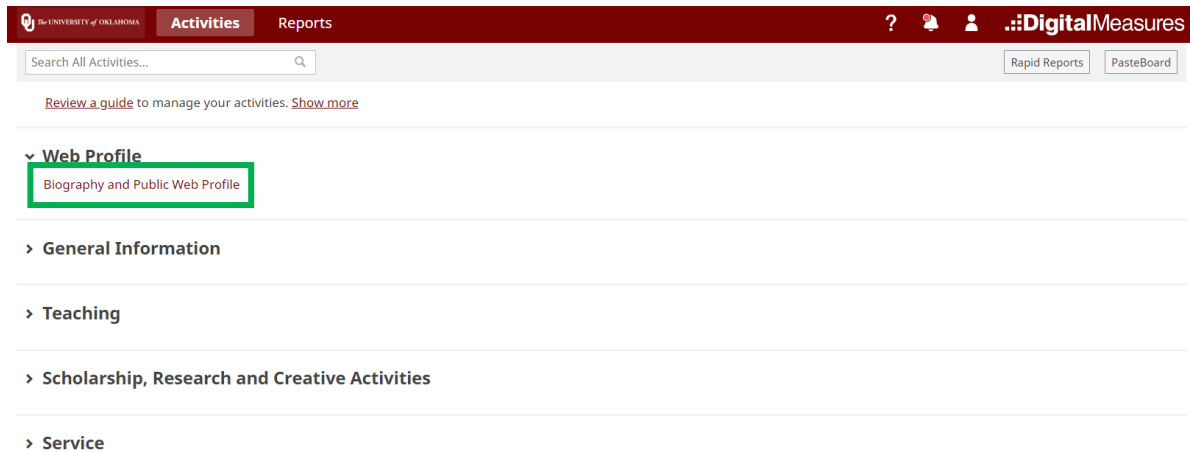
To populate a faculty web profile click on the Biography and Public Web Profile screen. Complete fields, select records to link on profile and click [💾 Save] . To preview profile content run Web Profile Review report found in Reports and Rapid Reports.

Workflow

The Workflow button will appear in the top Navigator Bar when an item in in your workflow inbox.

Help

When users have a question or would like to provide feedback on FAS, they can send a support request using the **?** Icon.

Get Help   ✕

Your feedback is important to us. Please complete the fields below adding as much detail as possible to assist with your comment, question or problem. The form below will be forwarded to the University of Oklahoma Activity Insight Administrator, Karen Horne.

Your Contact Information

⦿   Name   Faculty Test Record

    E-mail   [   ]

○   I want to remain anonymous
    Note: If you need a response, do not select this option

Your Question or Issue✱

[   ]

Cancel   Send

Your University Administrator will receive your inquiry and respond or forward your comment to the appropriate person or unit.

Logoff

Click 　 and select LogOut to logout of FAS. You will have to authenticate again to begin a new FAS session. Sessions automatically time out after 90 minutes of inactivity. Note that users will receive a warning prompt five minutes before their session times out, which will enable them to restore their session if it should remain active.

Faculty Activity System

Screen Quick Reference

Website login: http://www.ou.edu/provost/faculty-activity-system/

Fields highlighted in red populate the Annual Mini Vitae Report

Faculty Function	FAS Screen
Biography, teaching interests, research interests. Link selected activities to populate Public Web Profile	Biography and Public Web Profile
Name, contact information, office location, endowed and/or professorship name. Languages spoken, may attach cv, photograph and website links	Personal and Contact Information
Milestones of academic career; data import on Tenure Decision Date	Permanent Data
Yearly rank information, graduate faculty and tenure status. Partial import screen	Yearly Data
Employment history	Academic and Employment History
Administrative assignment: department head, director, dean, etc.	Administrative Assignments
Awards and/or honors nominated and/or received	Awards and Honors
Consulting: academic, government, litigation, non-governmental organization	Consulting
Educational history; data import if available	Education
External connections and partnerships, contact information	External Connections and Partnerships (Liberal Studies Screen)
Faculty development activities attended	Faculty Development Activities Attended
Licensures and certifications, e.g., law license, teaching certificate, engineering license, CPA, LMSW, IACUC, etc.	Licensures and Certifications
Audio/video, documentaries, podcasts, interviews	Media Contributions, Appearances and Interviews
University Libraries job responsibilities and major accomplishments	Position Description and Accomplishments (University Libraries Screen)
Membership in professional organizations	Professional Memberships
Teaching, research and service workload percentages	Workload
Administrative imported information, FY expenditure number	Academic Records and Annual Information
Number of students advised	Academic Advising

Faculty Function	FAS Screen
Detailed information on thesis/dissertation committees, independent studies, internships, postdoctoral research supervision.	**Directed Student Learning and Mentorship**
Guest lectures, classes at other universities, items not included in Scheduled Teaching, etc. May attached documents	**Other Instructional Activities**
Banner Credit courses imported once a semester from IRR; Partial import screen additional course information may be added. May attach syllabus and other course materials, indicate overload and new course prep, etc.	**Scheduled Teaching**
Artistic and professional creative activities, may attach digital documents	**Artistic and Professional Performances and Exhibits**
Grants, contracts, and sponsored research; proposals/awards imported data from Office of Research Services	**Grants and Sponsored Research (Office of Research Services)**
Contracts, fellowships, grants, and sponsored research, not captured by Office of Research Services import	**Contracts, Fellowships, Grants and Other Funded Research (Non Office of Research Services)**
Books, book chapters, journal articles, law review articles, textbooks, conference proceedings, etc. May attach publication	**Intellectual Contributions (e.g., Publications)**
Data for creating NIH biographical sketch reports	**Biographical Sketch - NIH**
Data for creating NSF biographical sketch reports	**Biographical Sketch - NSF**
Copyrights, patents, etc.	**Intellectual Property (e.g., copyrights, patents)**
Presentations, may attach presentation	**Presentations**
Research and creative activities in planning, on-going, or writing results phase; awarded grants are not recorded on this screen	**Research and Creative Activities Currently in Progress**
Service activities for home department	**Department Service**
Service activities for home college	**College Service**
Service activities for University of Oklahoma	**University Service**
Committee member, editorships, reviewer, officer in professional organizations, etc.	**Professional Service**
Outreach and Community engagement: Service activities that contribute to the public welfare beyond the university, drawing from the faculty member's expertise as a scholar, teacher or administrator.	**Outreach and Community Engagement**

Website login: http://www.ou.edu/provost/faculty-activity-system/