SHSU Watermark Faculty Success Activities Data Entry Guide

Tips Before You Start

Required Activities Entries

Faculty are asked to enter Activities necessary for generating an accurate and complete CV, as determined by the academic discipline and for use in the annual review, promotion and tenure, and post-tenure processes. There are additional, optional fields available within many of the activities categories or records that can be entered if desired.

Dates in Watermark Faculty Success

Every Watermark Faculty Success activity record includes at least one date field option that can be entered. At a minimum, one of these date fields must contain data for the record to save. These dates are important, as they are used to determine what will be included in any reports from the system (i.e., CV, annual review, P&T).

For completed activities, you may create a "date range" for each record. If the range overlaps the 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.

System Uploaded Fields and Records

While most activity record fields are blank and available for you to enter your information, some fields will have data provided from other campus systems, such as Banner. In those cases, you will see a **Lock** icon to the right of the field name. These system-populated fields include items such as official names and email addresses in the Personal and Contact Information, as well as portions of the Degrees records, both within the General Credentials/Expertise

Category. In addition, most fields in the Scheduled Teaching records within the Teaching/Mentoring Category will be provided for you. All fields within the Administrative Data category records (i.e., Permanent Data, Yearly Data, and Workload Information) are uploaded from campus systems and are locked. If any of the data in the locked fields appears to be incorrect or incomplete, please email facultyrecords@shsu.edu.
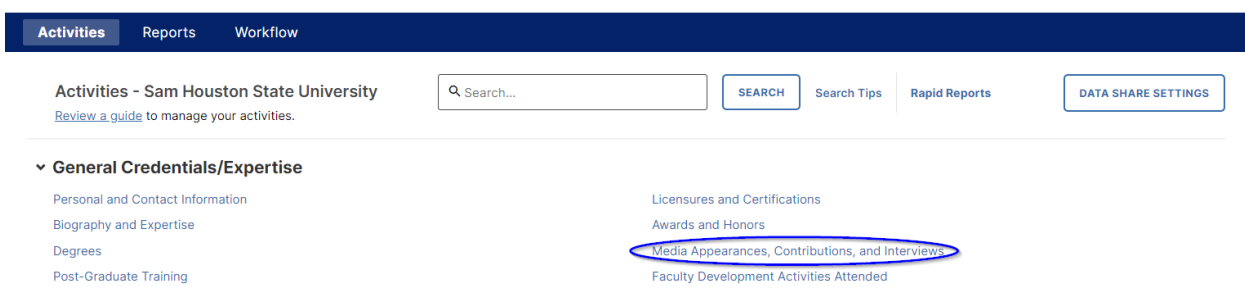
Where to Start

Logging into Watermark Faculty Success

1. Go to Watermark Faculty Success
   (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 Activities link in the upper left navigation bar.
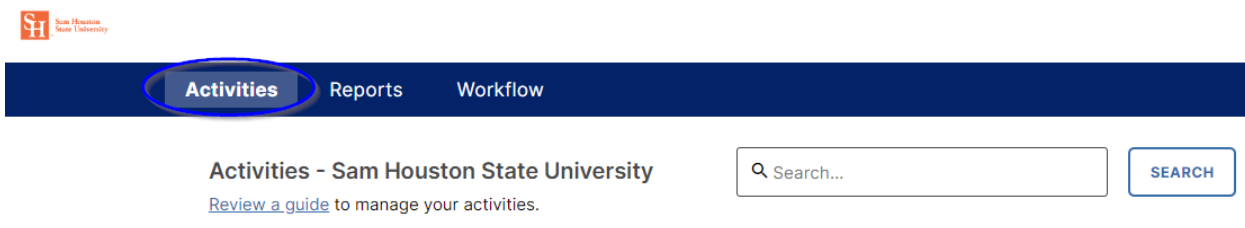
4. Move through each category to enter or update specific fields of information in your profile.

Enter an Activity

1. Click on the Activity Category.

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2. Click Add New Item.

3. Complete the Activity form. [NOTE: You may copy and paste from another document if you wish.]

4. If applicable, and in most activities in the Scholarship/Research category, click +Add Row in the Author/Presenter/Investigator/Performer/Inventor/Collaborator area to add multiple authors or participants (including students).

5. Click Save to save your activity entry.

6. If you have not entered data in a required field, you should see a note appear beside the empty section (like this one about a date).

Edit an Activity

1. Click on the Activity Category where the activity can be found.

2. Click the activity you wish to edit.

3. Make changes in the desired fields.

4. Click Save to save your activity entry.

5. Some activities' data will be provided from other campus systems. In fields of this type, you will see a Lock icon to the right of a checkbox or field name. In areas with locked

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checkboxes, such as Degrees or Schedule Teaching, you cannot add any new records, though there may be fields within uploaded records where additional, optional, data can be entered. Locked field information can only be edited by a system administrator – please email facultyrecords@shsu.edu if you find any incorrect or incomplete data in these fields.

Compare (Merge) Activity Entries

1. Click on the Activity Category where the activity can be found.

2. Check the boxes next to the activities (two or more) you wish to compare.

3. All checked records will be displayed in side-by-side columns, with entries to the various fields of each record appearing along the rows. You may scroll down the screen to view

and compare all fields appearing in the records. At the bottom of the page, you will see information about the source of the various records, as well as the date it was created, and the last time it was saved.

NOTE: The Original Source: will generally be Data Entry (for records you have created, in Publication activity entries the Original Source will show whether you have imported the record from a BibTex file, or from a Third-Party system such as ORCID.

4. If you determine the records represent different activity entries then you can click Cancel to exit the Comparison interface. If you determine that all records being compared refer to the same activity entry you can begin the process of merging them to a single record. First select the best entry for each field (row) among all compared records.

The Master Record field (which by default will be assigned to the first record) will contain the metadata used for any final merged record. This data includes the record ID, Allowing Sharing, the Original Source, and Created Date.

5. If you have selected fields from records, and clicked Continue to create a single merged record you will enter an activity screen similar to editing an activity. The main difference will be that the fields you see will now contain all of the selections you made from the compared records. You may make further edits if you wish at this stage. You may click the Back button if you want to change the field entries you selected.

6. Once you are satisfied with the new record click Merge. You will see a popup screen that lets you know it is about to merge the records using the data on the screen. The merge action cannot be undone. Click Cancel to return to the merged edit screen, or OK to merge the records.
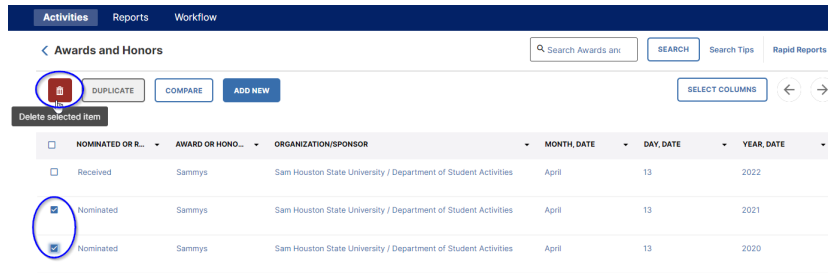
Duplicate an Activity

1. Click on the Activity Category where the activity can be found.

2. Check the box next to the activity you wish to duplicate.

3. Make changes in the desired fields.

4. Click Save to save your activity entry.

Delete an Activity

1. Click on the Activity Category where the activity can be found.

2. Check the box next to the activity you wish to delete.

NOTE: You can delete multiple activities by checking multiple boxes next to the activities you wish to remove.
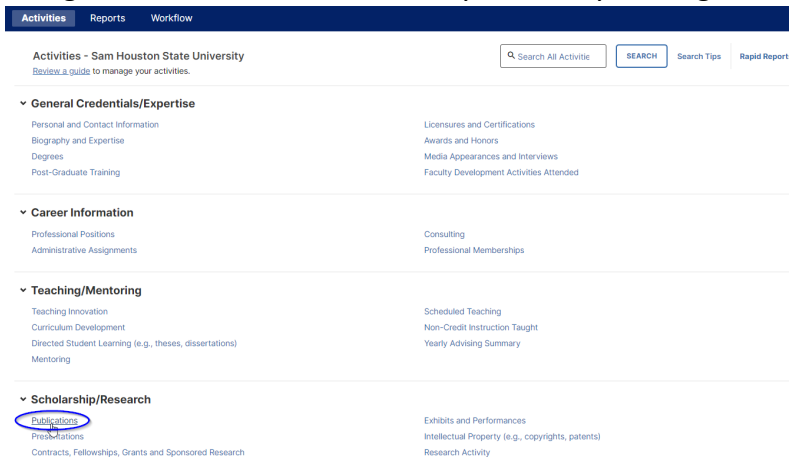
3. Click the delete icon.

4. Click Delete on the confirmation screen to delete the activity or click Cancel if you do not wish to delete it.
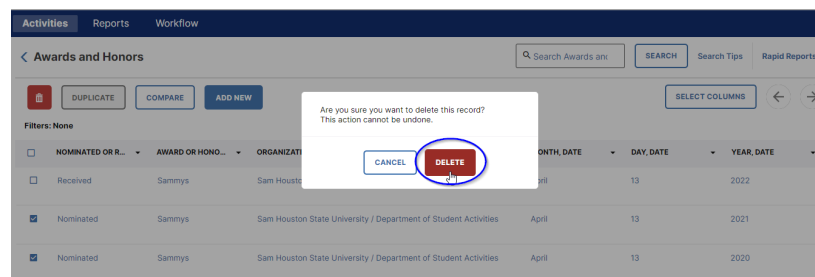
Import Publications

NOTE: This function is only available in the Publications Activity Screen.

1. Navigate to the Publications Activity Screen by clicking Publications.

2. Click the Import button in the upper right of the Publications screen.

3. There are two approaches to importing publication information: import citations from reference managers or databases where you have already stored your publications using a BibTeX file, or import records from third-party sources such as Crossref, ORCID, PubMed, or Web of Science.
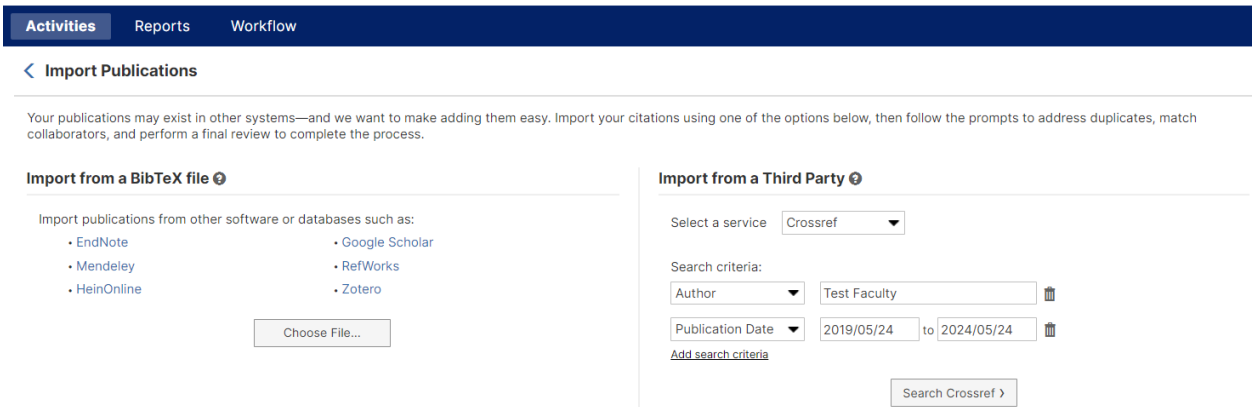
NOTE: BibTeX files can be imported from a variety of reference managers or databases where you have already collected citation information on your publications. These systems include EndNote, Google Scholar, HeinOnline, Mendeley, RefWorks, and Zotero. If you use other reference manager or citation software you may still be able to export your publications as long as that system can export a BibTeX file type.

Importing from a BibTexFile

4. First you must log into a reference manager you've used to store your publication citations, then you will export a BibTeX file from the system to a location on your computer. You import the file by clicking Choose File and browse your computer for the file (depending upon the citation system the file may be in varying formats such as **.bib** or **.txt**) you downloaded from your reference manager account.
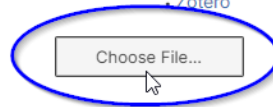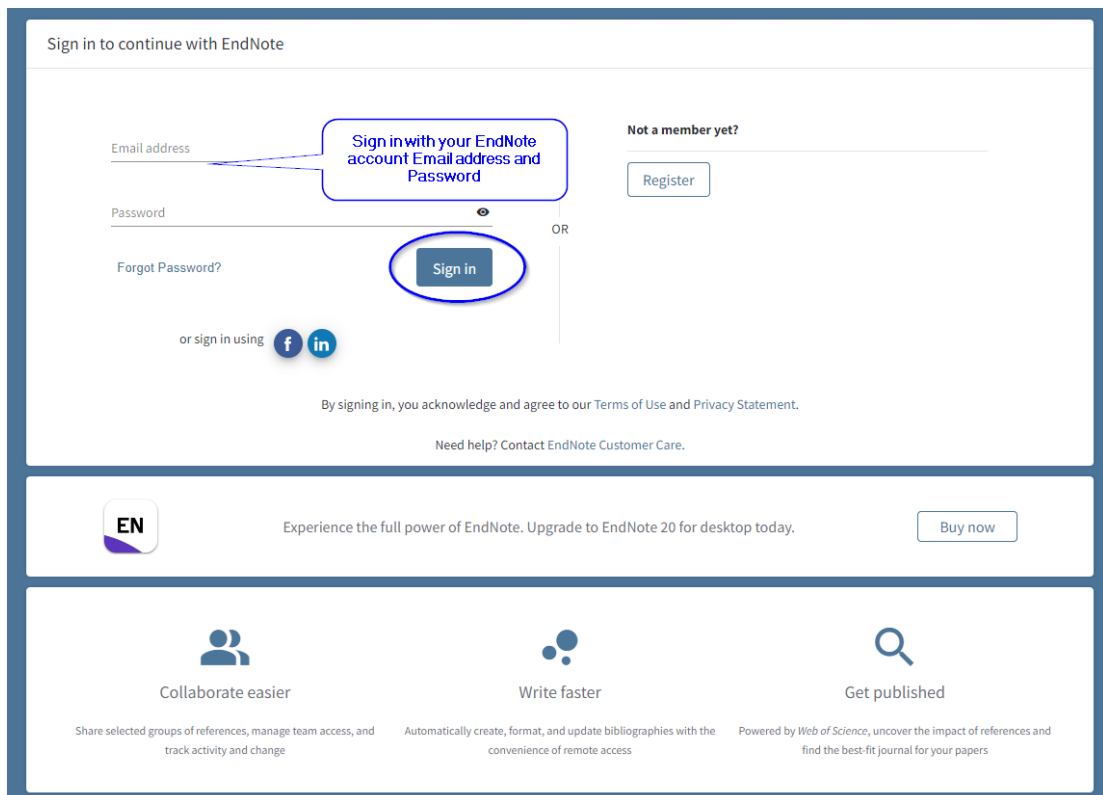
5. Below are a few examples of downloads from reference managers: [EndNote Web](), [Google Scholar](), and [Zotero Online]().

Exporting Citations from EndNote Web
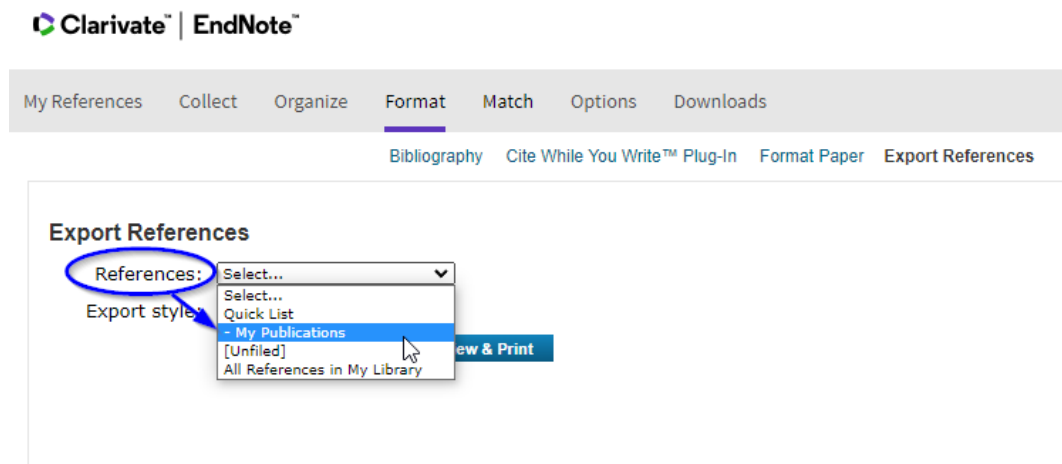
    A.   Log in to [MyEndNoteWeb]().

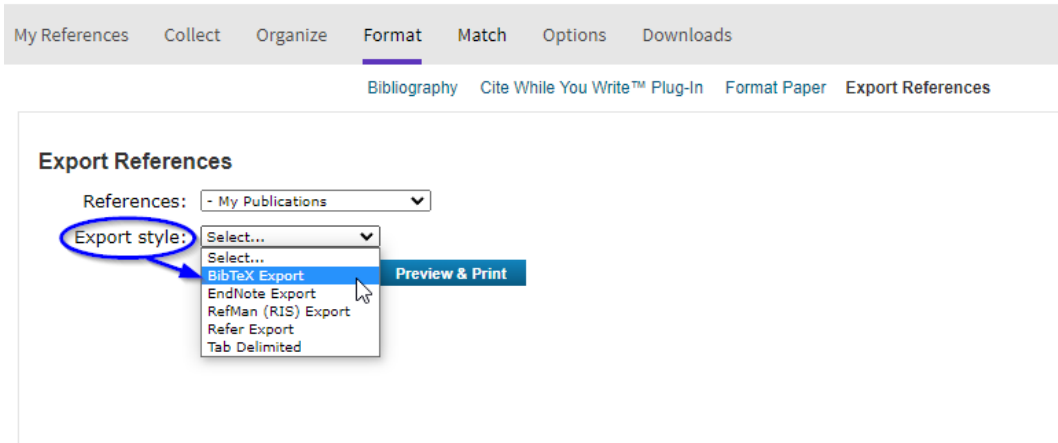B. You will land on the **My References** page.
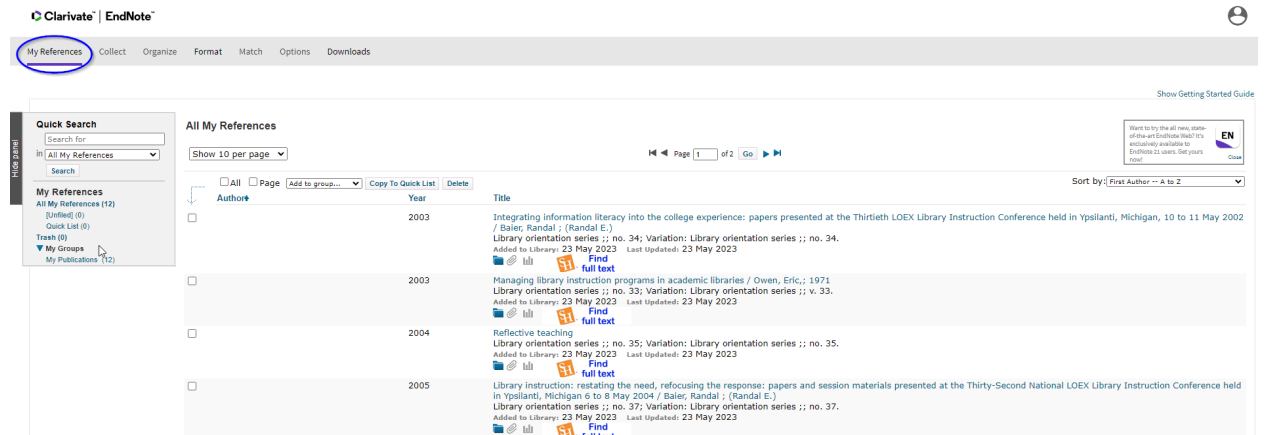
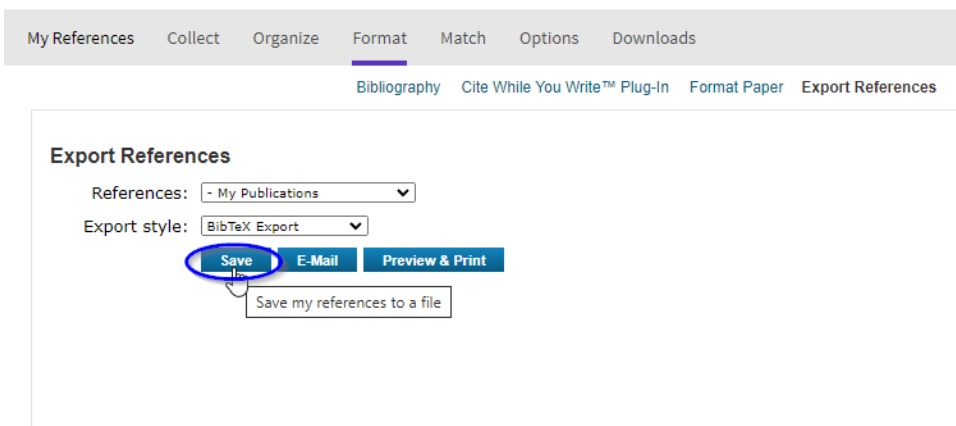C. To export your citations, navigate to **Format** and select the **Export References** link.
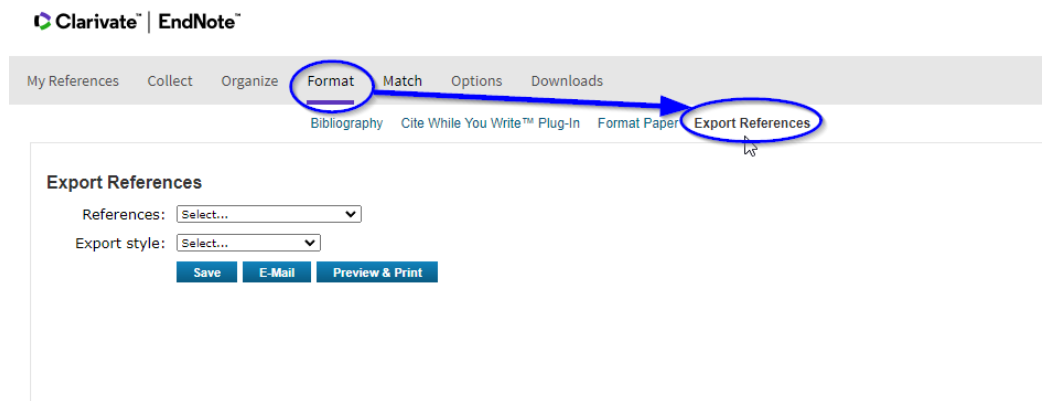
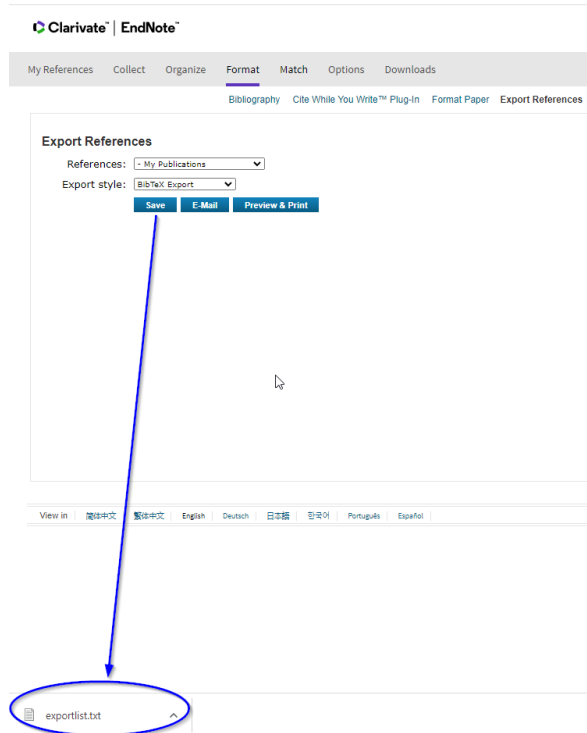D. Under **References** choose the library of citations you would like to export.

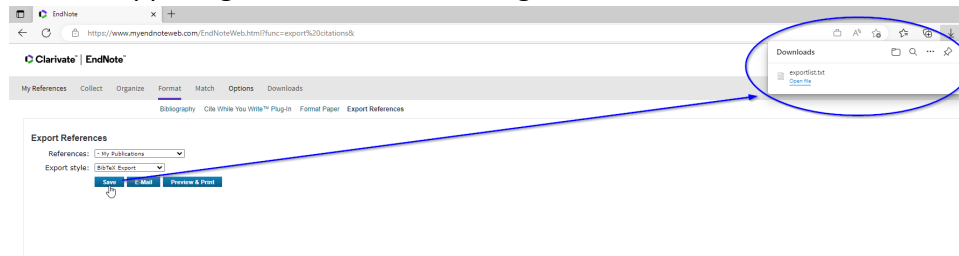
E. Under **Export Style** choose **BibTeX Export**.

F. Select to save the export file. The default file created will be titled **exportlist.txt**.
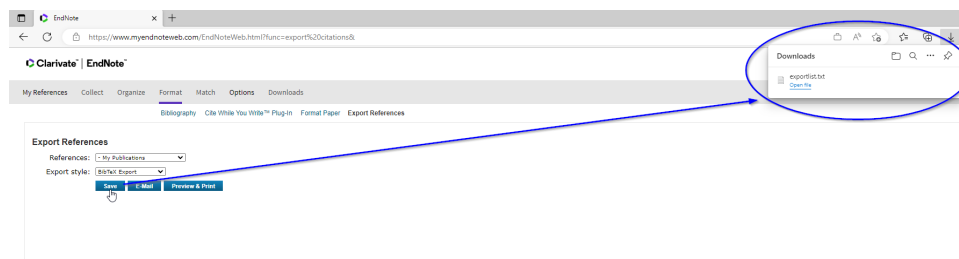
G. Depending upon which browser you are using a link should appear to the saved file: near the bottom left of the screen in the Google Chrome browser
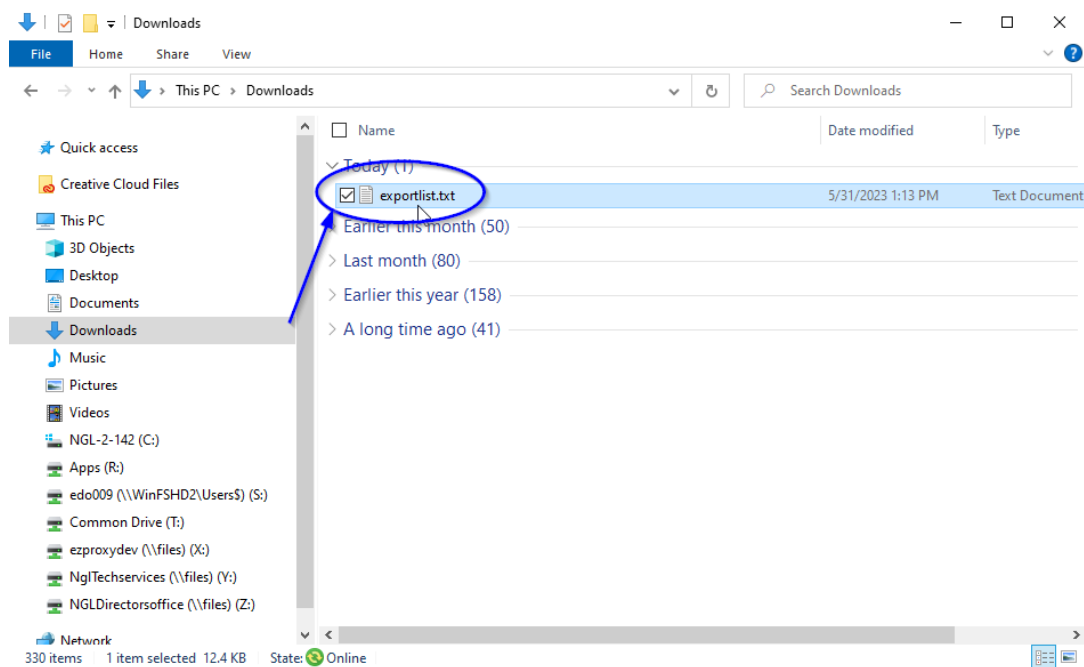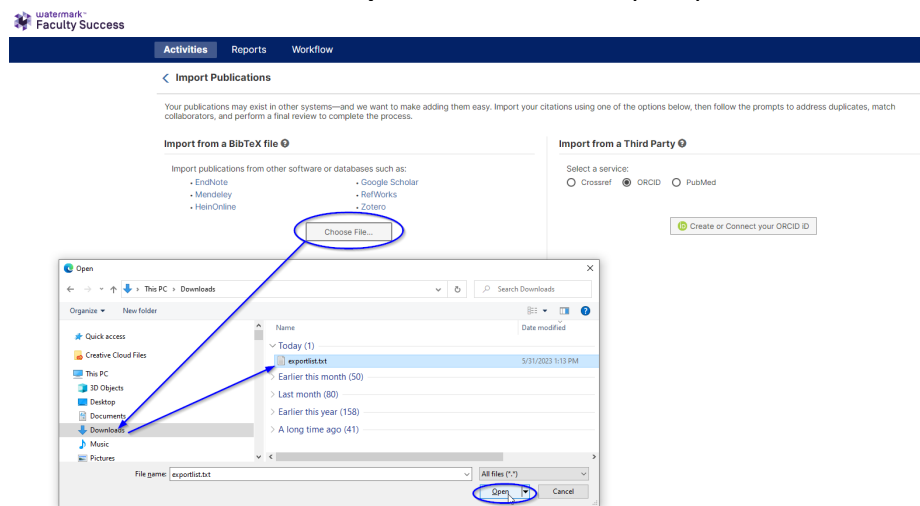

and the upper right in the Microsoft Edge browser

or Mozilla Firefox browser

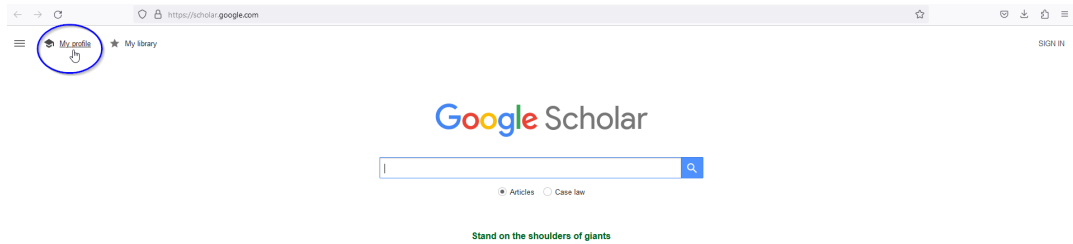H. A copy of the **exportlist.txt** file should be saved in your computer's Downloads folder

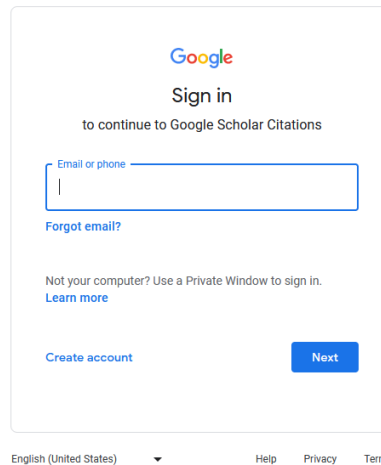I. You can now Choose the **exportlist.txt** file to import publications

Exporting Citations from Google Scholar

A. Navigate to Google Scholar.

B. You will see two options at the top left, My Profile and My Library. Select My Profile.

C. If you are not yet logged in, enter your credentials to sign in.

D. Upon signing in you should land on your profile page where you will see a list of your "articles."

E. Click on the check box next to each article you would like to export, to select all articles simply click on the checkbox at the very top.

F. Once you've made your selections select the Export option and choose BibTex as your file format. This will convert your articles into BibTeX format.

G. Your publications will then be displayed in the BibTex format style in your browser window.


```
@article{glover200515th,
    title={15th Conference on Computers, Freedom and Privacy: Panopticon},
    author={Glover, Barbara and Owen, Eric and Storm, Paula},
    journal={Library Hi Tech News},
    volume={22},
    number={8},
    pages={4--8},
    year={2005},
    publisher={Emerald Group Publishing Limited}
}

@article{glover2004conference,
    title={Conference on Computers, Freedom and Privacy: Going Strong in its 14th Year},
    author={Glover, Barbara and Owen, Eric},
    journal={Library Hi Tech News},
    volume={21},
    number={7},
    pages={5--10},
    year={2004},
    publisher={Emerald Group Publishing Limited}
}

@book{nims2003managing,
    title={Managing library instruction programs in academic libraries},
    author={Nims, Julia K and Owens, Eric},
    volume={33},
    year={2003},
    publisher={Pierian Pr}
}

@incollection{marks2016everywhere,
    title={It Is Everywhere: Handling a Mold Outbreak in a Library's High-Density Storage Collection},
    author={Marks, Alexis Braun and Owen, Eric},
    booktitle={Handbook of Research on Disaster Management and Contingency Planning in Modern Libraries},
    pages={311--339},
    year={2016},
    publisher={IGI Global}
}

@incollection{owen2014political,
    title={Political positioning},
    author={Owen, Eric},
    booktitle={The Machiavellian Librarian},
    pages={295--311},
    year={2014},
    publisher={Elsevier}
}

@book{smallwood2013time,
    title={Time and project management strategies for librarians},
    author={Smallwood, Carol and Kuhl, Jason and Fraser, Lisa},
    year={2013},
    publisher={Scarecrow Press}
}
```
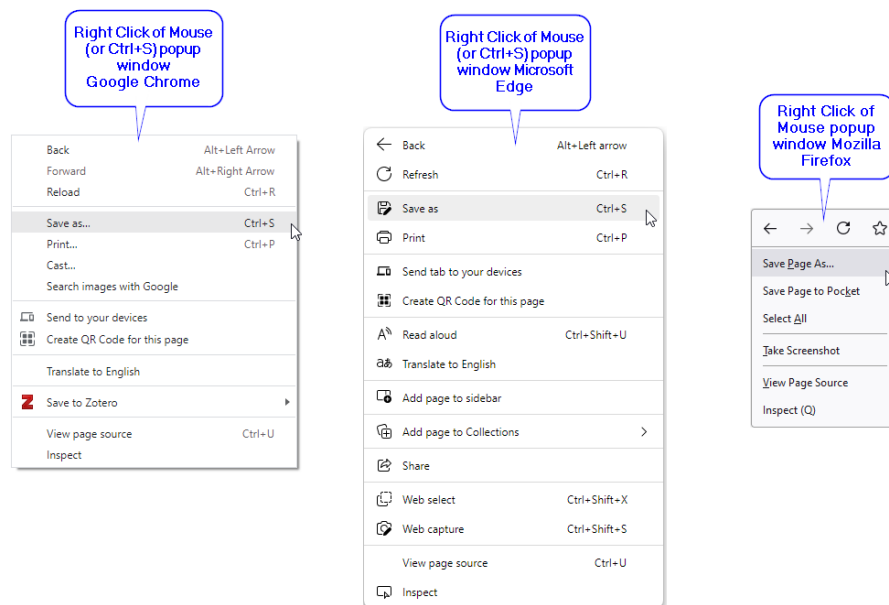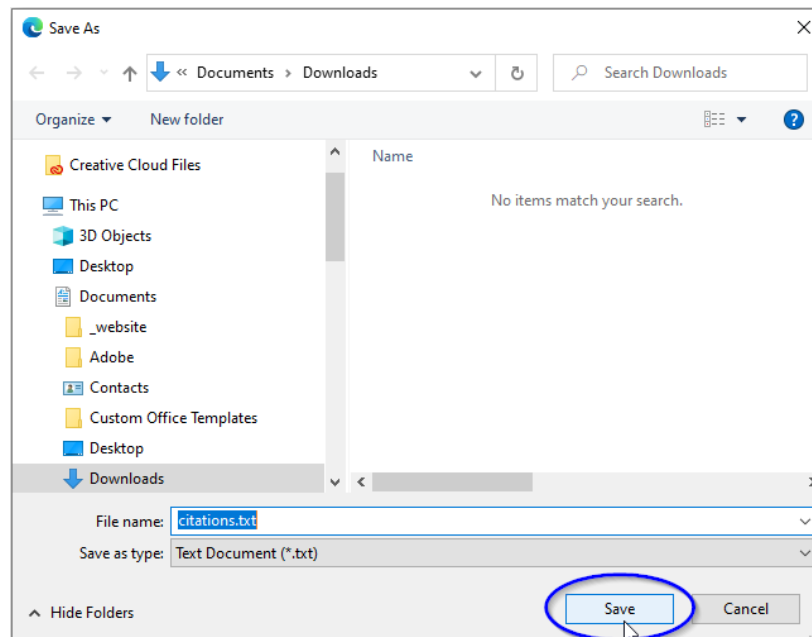
H. The easiest way to create an import file from the browser display is to do a Save As – in Google Chrome and Microsoft Edge you can use Ctrl+S – alternately (using a PC mouse) right click and choose Save As.
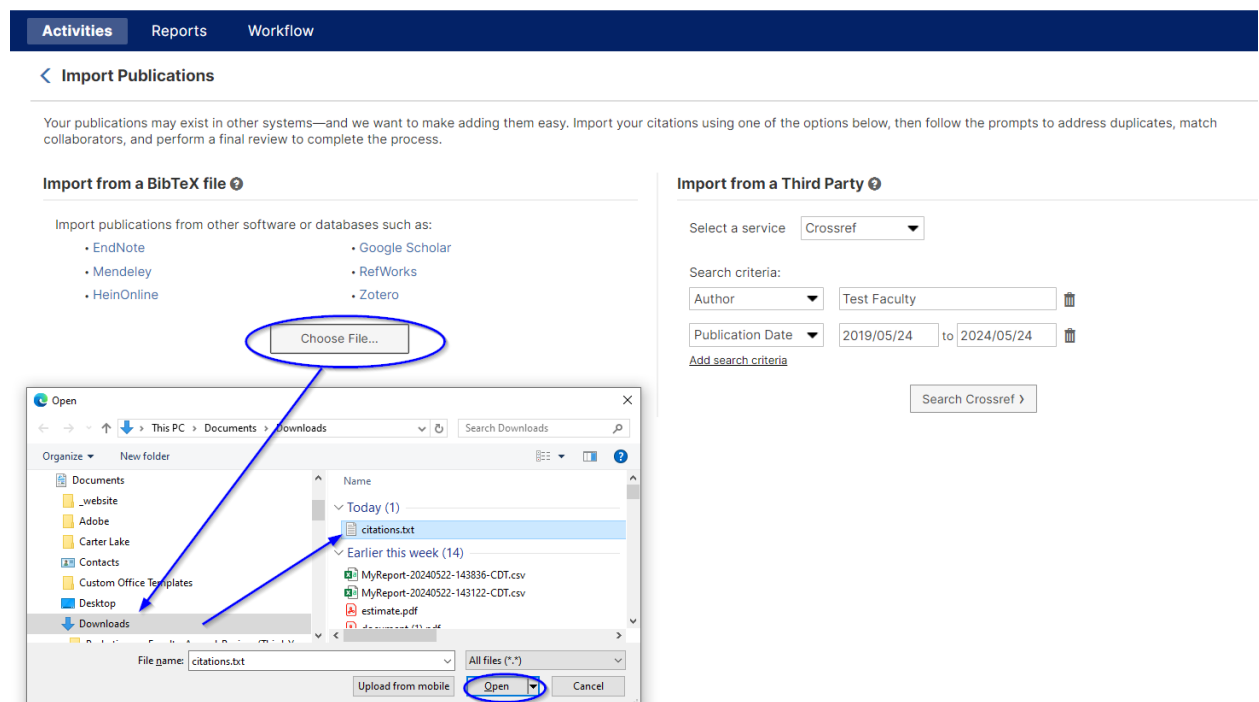
I. Any of the Save As options above will create a file in your computer's Downloads folder called **citations.txt** by default.
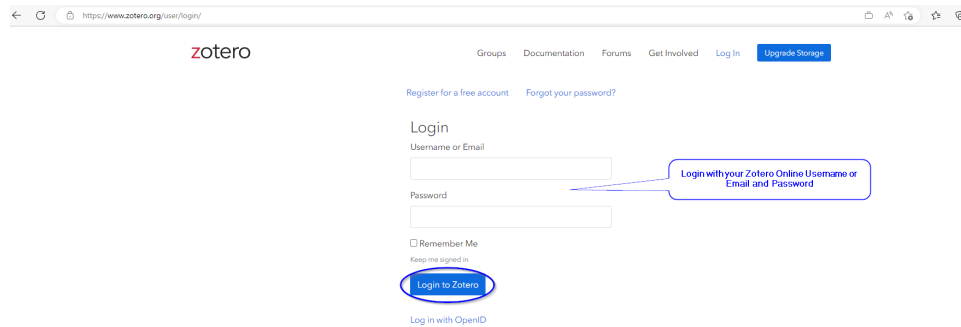

NOTE: You may also copy and paste the displayed BibTex format citations into a text editor (such as Notepad for PC or TextEdit for Mac) and save it as a **.txt** or **.bib** file.

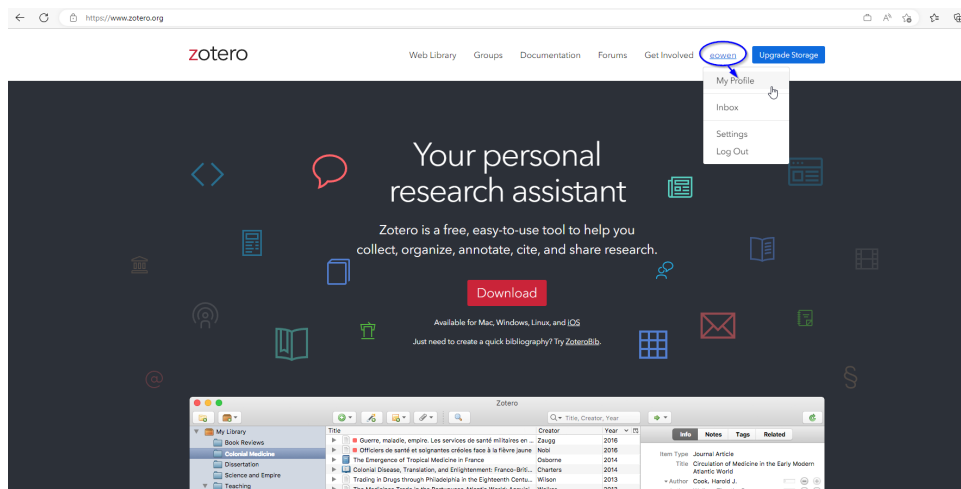J. You can now Choose the **citations.txt** file to import publications

Exporting Citations from Zotero Online

A. Navigate to [Zotero's login page](#) and log in to your account.
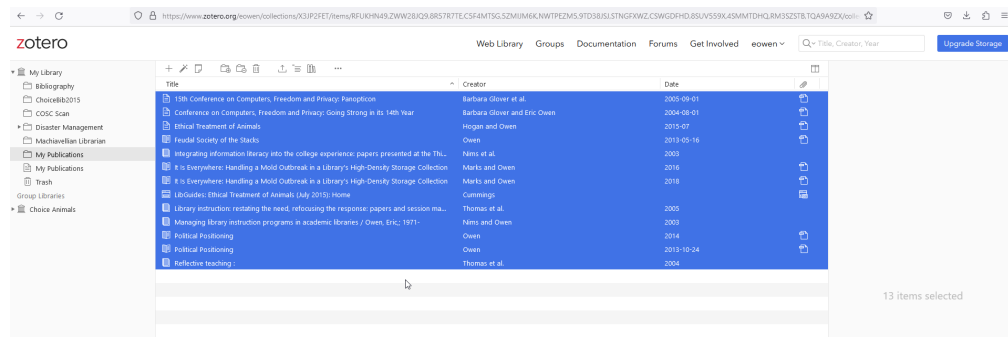

B. In the links at the top select your account (in this example eowen) and choose My Profile.

C. Next select **My Library** and from the list on the left-hand side, select the citation collection from which you would like to export (in this example the folder **My Publications** is chosen.)
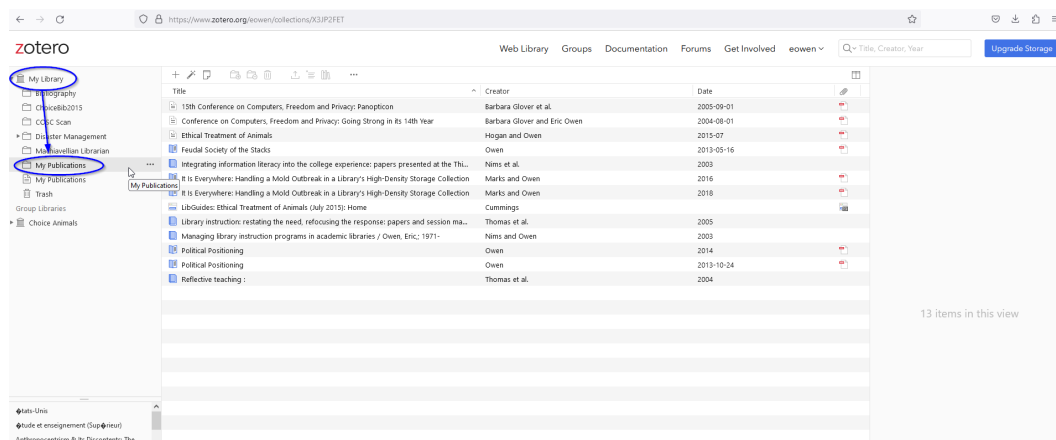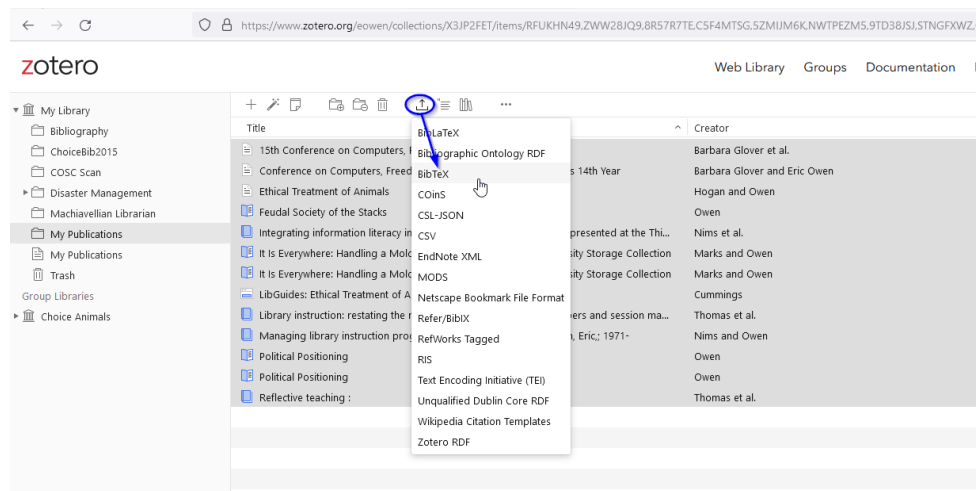
D. In the pane on the right select the citations you would like to export.

E. Select the **Export** icon ⬆, which appears near the middle of a string of icons just above the Title Column of the visible citations.
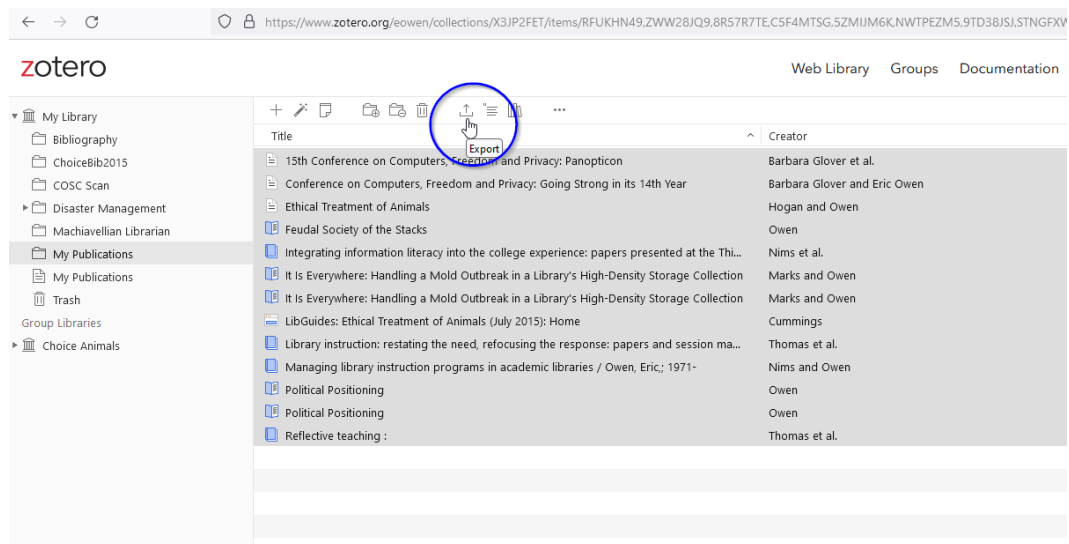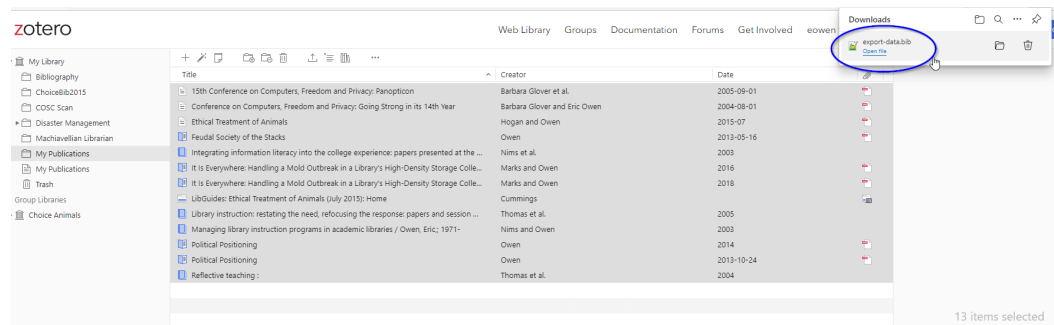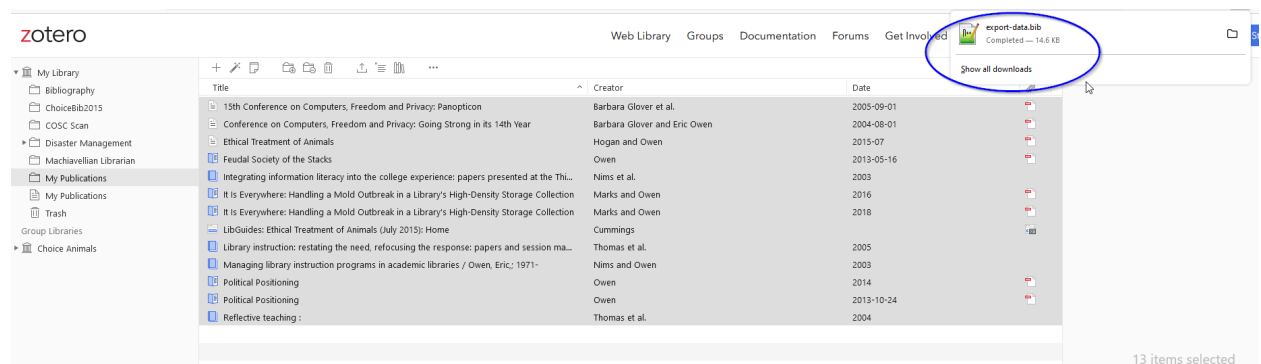

F. Select the **BibTeX** output option.

G. Depending upon which browser you are using a link should appear to the saved file. The default file title will be **export-data.bib** near the bottom left of the screen in the Google Chrome browser
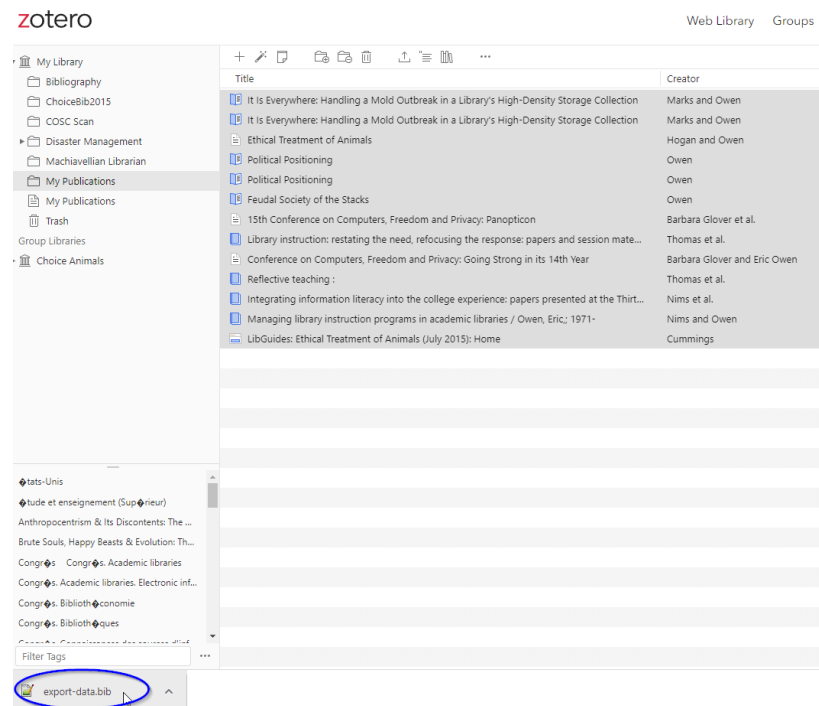
and the upper right in the Microsoft Edge browser

or Mozilla Firefox browser

K. A copy of the **export-data.bib** file should be saved in your computer's Downloads folder. You can now Choose the **export-data.bib** file to import publications
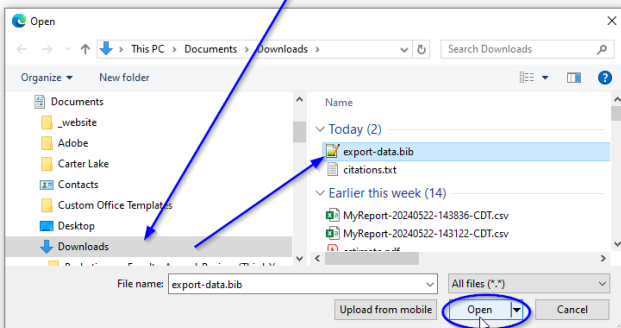

6. You will enter the Importing Publications: Review and Finish screen where you can review the publications you are about to import by clicking on the arrows on either side of the current Item.

7. Click Finish Import once you've verified the entries are correct.

8. Click Import again to complete the publication load.

NOTE: The Faculty Success System will automatically search for duplicate activities already in the system. For each of the potential duplicate records, you must choose to either skip the record or choose to import.

9. If duplicate entries are suspected, you will enter the Import Publications: Duplicates screen. Potential Match records will be displayed side-by-side.

10. You may select the option to either Skip, which will not include the publication from the import file, or Import, which will add the publication entry.

11. Once you have completed the review of potential matched records you click Continue, which will return you to the Import Publications: Review and Finish screen (see Step 4 above) to complete your review of publications for import.

Importing from a Third Party

12. For third-party imports, select a service from the drop-down menu choosing either Crossref, ORCID, PubMed, or Web of Science. For Crossref, PubMed, or Web of Science you will enter search criteria, such as Author/Editor/Title/etc., as well as a Publication Date range.   Additional fields can be added by clicking Add search criteria. Then, click the search button for the service.

13. You will enter the Importing Publications: Select Items to Import screen where you can check boxes next to the items you wish to import.

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NOTE: You can select multiple items on the same screen. If the number of matchings items is too large, the system will display the 200 most relevant matches. You can also modify your search to narrow the results.

14. For an ORCID import first click on the Create or Connect your ORCID iD button.

This will send you to an ORCID Sign in page.
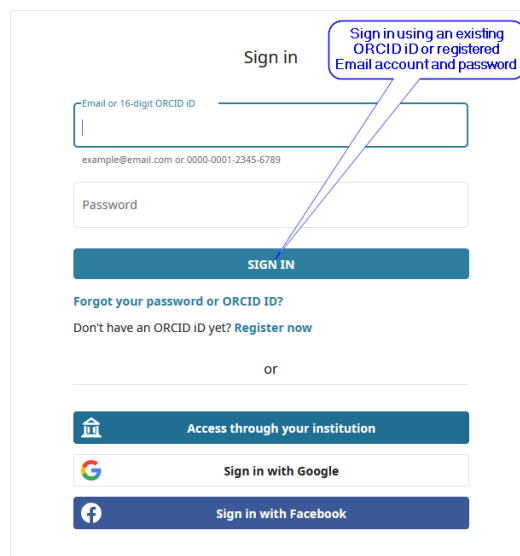
Once you are signed in the ORCID import interface in Watermark will change. You should see a line now saying Connected to followed by a link to your ORCID account, and a Search ORCID button will appear. There will also be a Disconnect link if you wish to sever this ORCID connection.

Import from a Third Party ❓

Select a service **ORCID** ▼

Connected to ⓘ orcid.org/0000-0002-0076-3919 ↗

Search ORCID ›

Disconnect
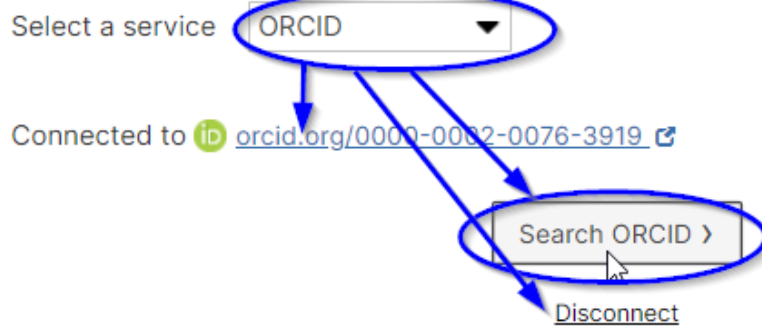
15. Clicking on the Search ORCID button will now display a list of publications pulled from your ORCID account. You may select the items you wish to import by checking the boxes to the right of the screen, and then clicking Continue near the upper right.

| **Activities** | Reports | Workflow |

Import Publications: Select Items to Import   Step 1 of 4   Cancel Import   Continue ›

Displaying 12 publications found in ORCID ordered by relevance.
Select the items you want to import and click Continue.

Item	☑
It Is Everywhere IGI Global Marks, Alexis; Owen, Eric 2016	☑
15th Conference on Computers, Freedom and Privacy: Panopticon Emerald **3 Total Authors** Glover, Barbara; Owen, Eric; Storm, Paula September 1, 2005	☑
Political positioning Elsevier Owen, Eric 2013	☑
Conference on Computers, Freedom and Privacy: Going Strong in its 14th Year Emerald Glover, Barbara; Owen, Eric August 1, 2004	☑
Ethical Treatment of Animals American Library Association Hogan, W.; Owen, E. July (3rd Quarter/Summer) 1, 2015	☑
Reflective teaching : Faculty, Test 2004	☑
Managing library instruction programs in academic libraries / Owen, Eric,; 1971- Faculty, Test 2003	☑
Library instruction: restating the need, refocusing the response: papers and session materials presented at the Thirty-Second National LOEX Library Instruction Conference held in Yps... Faculty, Test 2005	☑

NOTE: like the BibTeX file imports, items imported from an ORCID search will come from your ORCID account's list of stored works. If you do not currently have an ORCID account, this search will not provide publication citations to import.

16. From any Third Party import (Crossref, PubMed, ORCID, or Web of Science) the system will look to match collaborators from the imported publication entries to people at SHSU.

17. Where similar names appear (i.e., the same last name/first name vs last name/first name initial) Watermark allows you to Select a different user account, if these names are different people. If the names have been correctly matched you can leave the assigned account as is (you don't have to do anything.) If the names should be matched to a different user account select the correct account and click OK. If the name is neither a match for the current account nor any other account in the system click on No Matching Account.

18. If Watermark cannot find a match with other Sam Houston State University personnel as the names of imported collaborators, the system will allow you Match to a user account. If the name(s) do not correspond to any Sam Houston State University account you can leave these names as is (you don't have to do anything.) Alternately you can select No Matching Account in the Match user account pop up. If the name should be matched to an existing Sam Houston State University account you can select that account and click OK.
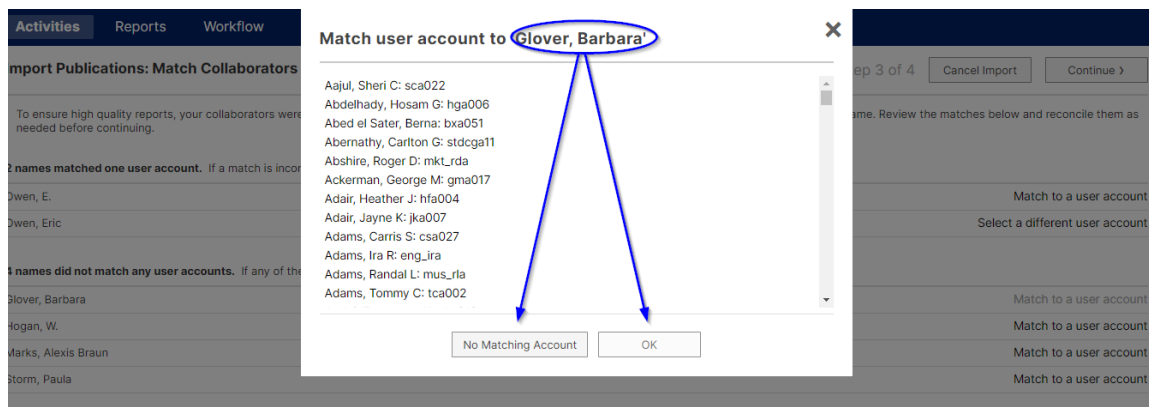
19. Once you have completed matching potential SHSU collaborators to system accounts you click Continue, which will return you to the Import Publications: Review and Finish screen (see number 6 above) to complete your review of publications for import.

NEW - Exporting Publication Data to ORCID Account
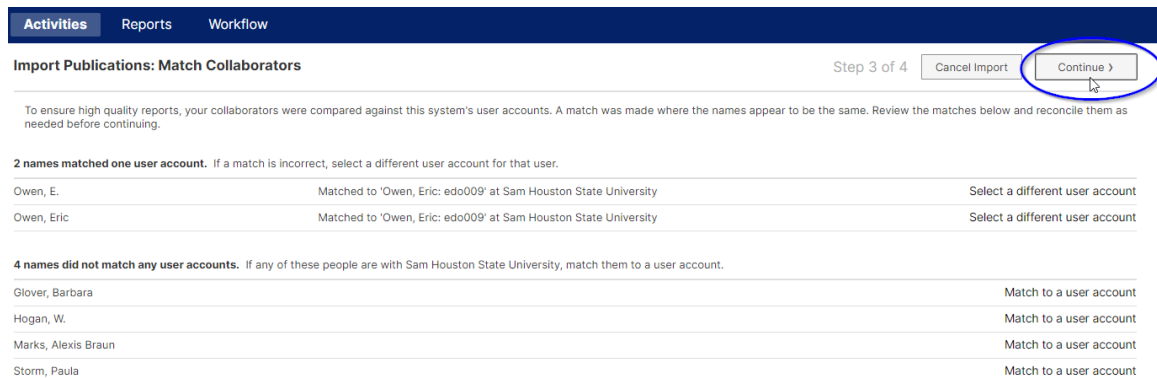
During the Summer 2024 Watermark deployed a new Export option to help sync your publication entries in Watermark to automatically export the data to a connected ORCID account.

1. On the main Activities page you will now see a Data Share Settings button.
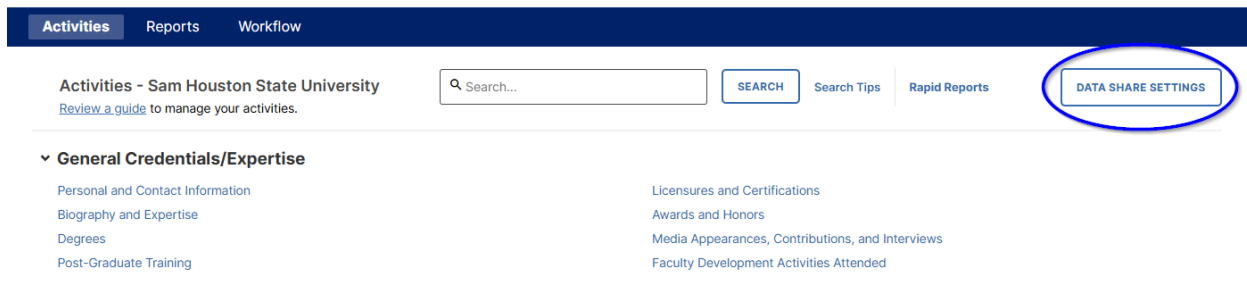
2. The first time you click on the Data Share Settings button you will be given the option to Create or Connect your ORC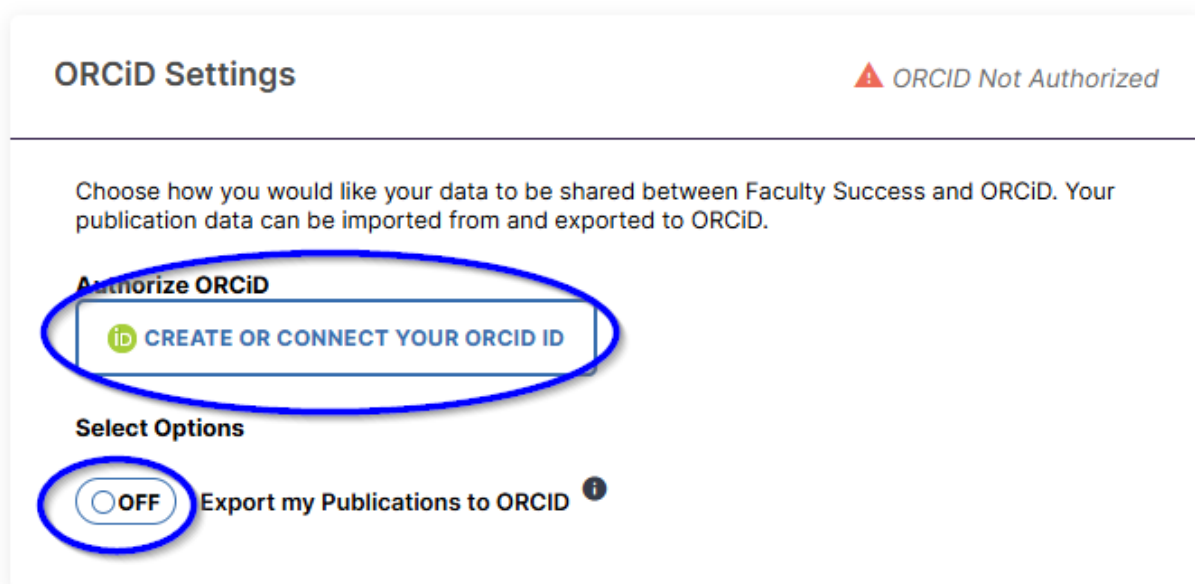ID ID – and you will see an On/Off Toggle to **Export my Publication to ORCID**. Setting this Toggle to On will send your publications to ORCID immediately, and any updates made to your Faculty Success publications will be sent to ORCID each Sunday.

3. Clicking on the Create or Connect Your ORCID ID button will open up a pop-up window to Sign in to ORCID – or if you do not have an ORCID account yet you can click on a Register now link which will lead you through 5-step process to register your names and emails to an ORCID account.

   NOTE - You may see a pop-up window from ORCID concerning Cookie Consent. You may click on Reject, Accept, or click on the X in the upper right to simply close this window.
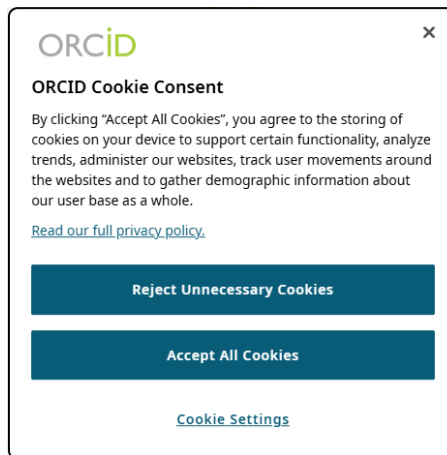
4. Once you have an ORCID account you can enter your associated Email address, or your 16-digit ORCID ID, along with your ORCID Password. If your account is associated with your SHSU account, or your Google account you may also choose one of those sign in methods near the bottom of the pop-up window.

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In this example we have used an ORCID ID and Password to Sign in to ORCID.

5. Once you have successfully connected to your ORCID account you will see a Connected to ID line with a URL linking to your ORCID account. Beneath this you will see Disconnect – which provides you an option to break the connection between Watermark and ORCID. In the upper right-hand portion of the ORCiD Settings box you will see a ⚠ and the statement ORCID Not Authorized.

6. Once you click on the Select Options toggle moving it from OFF to ON you will see the upper right-hand statement change to ✅ Connected.

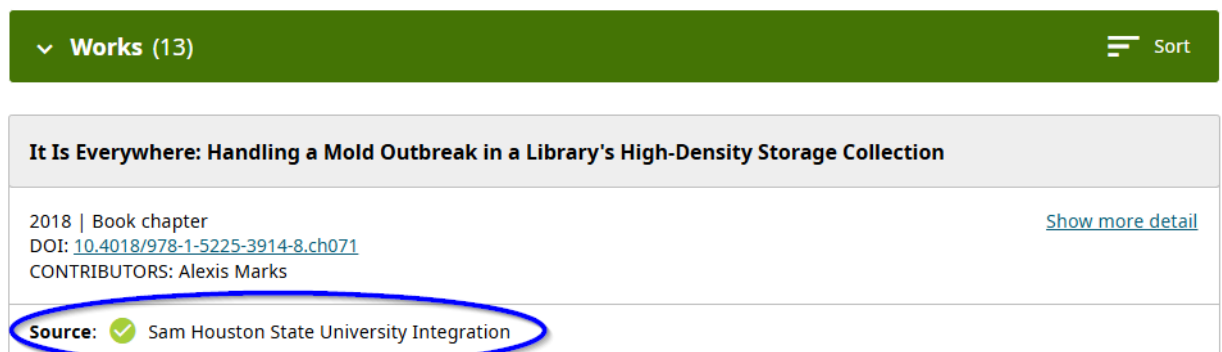   NOTE: Setting this Toggle to On will send your publications to ORCID immediately, and any updates made to within your Faculty Success publications entries will be sent to ORCID each Sunday.

7. Entries that have been exported from Watermark into your ORCID account will be identified in ORCID with the Source: ✅ Sam Houston State University Integration.

Search Activities

Faculty Success allows you to search for an item across all entries for your activities in the system, or you can focus only within an individual category.

Use the Search All Activities feature when you are not sure of the activity's location. Use the search feature for an individual page if you are sure in what category the activity belongs.

1. On the main Activities overview, enter your search criteria in the search box.

2. Click the Search button to begin your search.

Search Individual Pages

1. Click into the category in which the activity you are looking for is stored.

2. Enter your search criteria in the search box.

3. Click the Search button to begin your search.

See SHSU Watermark Faculty Success Training and Resources (https://www.shsu.edu/dept/academic-affairs/watermark/training.html) page for additional assistance in entering and maintaining your faculty success activities data.