

# Faculty Success

## Watermark Activities Help Guide



The following guide has been created to assist Texas A&M University- Kingsville faculty to enter data into the Activities database in the Watermark Faculty Success system.

Watermark also provides general guidelines on their Faculty Success system that we recommend you review before entering your Activities data into the system: [Faculty Success Overview](#) and [Watermark Faculty Success Features](#).

## Tips Before You Start

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### 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, continuation, promotion, promotion and tenure, and post-tenure processes. Additional, optional fields are available within many of the activity categories or records that can be entered if desired.

Most activities provide the opportunity to upload attachments as evidence items relating to the specific activity. With one exception, these evidence items will not transfer into a Workflow for any evaluation submission. However, Faculty should upload syllabi and old, non-Watermark Student Ratings of Instruction reports (SRI) for each course in the Scheduled Teaching activity.

### Dates in Watermark Faculty Success

Every Faculty Success activity record includes at least one date field option that can be entered. 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)


**TIP:** At a minimum, one of these date fields must contain data for the record to save.

For completed activities, you can specify a date range for each record. If this range overlaps with the reporting period, the record will be included in the report. 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 (e.g., 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 by 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. 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 appear to be incorrect or incomplete, please email [jennifer.vela@tamuk.edu](mailto:jennifer.vela@tamuk.edu).

### **Importing Publications**

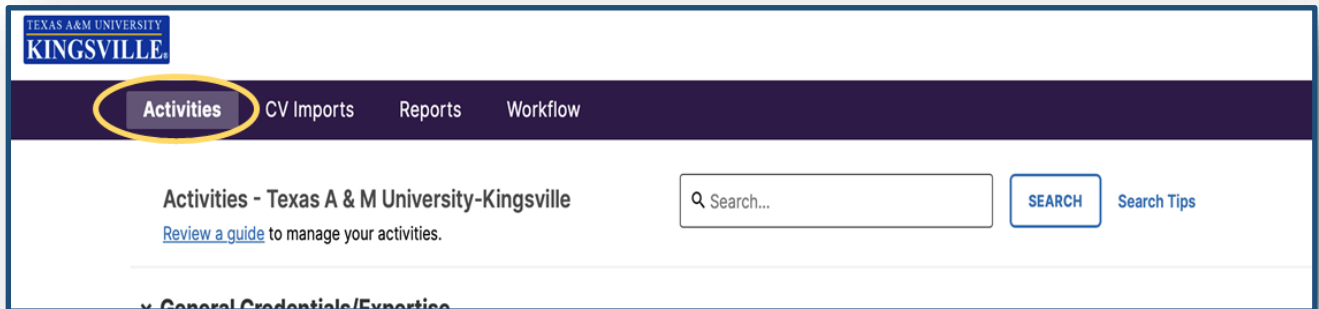
Publications activities under the Scholarship/Research section of Faculty Success allow for an import of a bibliography of your works using a BibTeX file from software such as EndNote, Google Scholar, HeinOnline, Mendeley, RefWorks, or Zotero. There is also an interface to search some third-party sources (Crossref, ORCID, PubMed) for publications in their databases, the results of which can then be imported directly into your records. Please reference the Watermark Publication [Import Overview](#) and [Import Publications](#) guide for more information.

**TIP:** Always review entries after importing. Some errors have been identified in the importing process.

# Where to Start

## Logging into Watermark Faculty Success

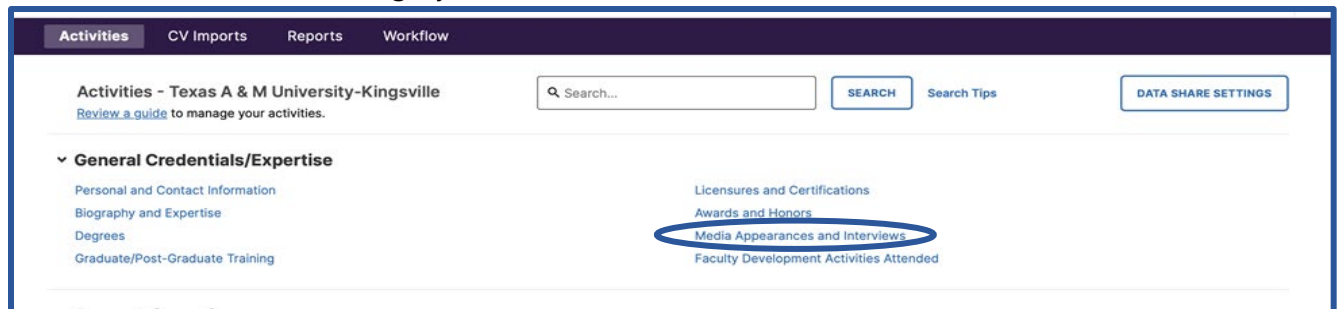
1. Go to [Watermark Faculty Success](https://login.watermarkinsights.com/connect/tamuk/)- <https://login.watermarkinsights.com/connect/tamuk/>
2. NOTE: You may receive a two-factor authentication (Duo Security) prompt to connect via campus Single Sign-On (SSO).
3. Click the Activities link in the upper left navigation bar.



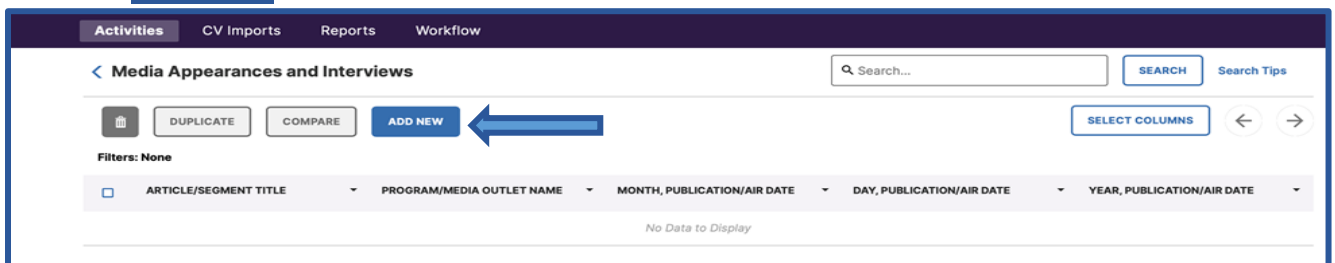
4. Move through each category to enter or update specific fields of information in your profile

## Enter an Activity

1. Click on the Activities category.



2. Click **ADD NEW** item.



**TIP:** You may copy and paste from another document if you wish.

**TIP:** Remember to enter a date.

3. Complete the activity form.
4. If applicable, and in most activities in the Scholarship/Research category, click **+ADD ROW** in the Author/Presenter/Investigator/Collaborator area to add multiple authors or participants (including students).

**Collaborators (1)**

Please select a person from the drop-down list and/or enter their name in the input fields.

1st Collaborator Actions

People at Texas A & M University-Kingsville	First Name	Middle Name/Initial	Last Name
Velez Hernandez, Maria (kumeh011)	Maria		Velez Hernandez

Institution/Company:  If a student, what is his/her level?:

**+ ADD ROW**

2nd Collaborator Actions

People at Texas A & M University-Kingsville	First Name	Middle Name/Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Institution/Company:  If a student, what is his/her level?:

**+ ADD ROW**

5. Click **SAVE** to save your activity entry.

Activities CV Imports Reports Workflow

**Edit Media Appearances and Interviews** CANCEL **SAVE** SAVE + ADD NEW

Media Type:

Article/Segment Title:

Program/Media Outlet Name:

Web Address:

Description:

Publication/Air Date: Month  Day  Year

Remember to enter a date

6. If you have not entered data in a required field, you should see a note appear beside the empty section (as pictured

The image shows two date input sections. The first is labeled "Start Date" and contains three fields: "Month" (a dropdown menu), "Day" (a text input), and "Year" (a text input with a red triangle icon). The "Year" field is highlighted with a red border, and a red error message "At least one date is required" is displayed below it. The second section is labeled "End Date" and contains the same three fields. The "Year" field is also highlighted with a red border, and the same red error message "At least one date is required" is displayed below it.

## Edit an Activity

1. Click on the Activities category where the activity can be found.

The image shows the top navigation bar of the system with tabs for "Activities", "CV Imports", "Reports", and "Workflow". Below the navigation bar, the page title is "Activities - Texas A & M University-Kingsville". There is a search bar with a "SEARCH" button and a "DATA SHARE SETTINGS" button. The main content area is divided into two sections: "General Credentials/Expertise" and "Career Information". Under "General Credentials/Expertise", there are links for "Personal and Contact Information", "Biography and Expertise", "Degrees", "Graduate/Post-Graduate Training", "Licensures and Certifications", "Awards and Honors" (circled in blue), "Media Appearances and Interviews", and "Faculty Development Activities Attended". Under "Career Information", there are links for "Professional Positions", "Administrative Assignments", "Consulting", and "Professional Memberships".

2. Click the activity you wish to edit.

The image shows the "Awards and Honors" page. At the top, there is a search bar and a "SEARCH" button. Below the search bar, there are buttons for "DUPLICATE", "COMPARE", and "ADD NEW". There is also a "SELECT COLUMNS" button and navigation arrows. The table below has the following columns: "NOMINATED OR RECEIVE...", "AWARD OR HONOR NAME", "ORGANIZATION/SPONSOR", "MONTH, DATE", "DAY, DATE", and "YEAR, DATE". The table contains one row with the following data: "Nominated", "People's Choice Award", "TAMUK", "January", "14", and "2024". A blue oval highlights the entire row, and a blue arrow points to the "People's Choice Award" cell.


NOMINATED OR RECEIVE...	AWARD OR HONOR NAME	ORGANIZATION/SPONSOR	MONTH, DATE	DAY, DATE	YEAR, DATE	
<input type="checkbox"/>	Nominated	People's Choice Award	TAMUK	January	14	2024

3. Make changes in the desired fields.

The screenshot shows the 'Edit Awards and Honors' form. At the top, there are navigation tabs: 'Activities', 'CV Imports', 'Reports', and 'Workflow'. Below the tabs are three buttons: 'CANCEL', 'SAVE', and 'SAVE + ADD NEW'. The form fields include: 'Type' (set to 'Award'), 'Nominated or Received?' (dropdown menu open with options 'Nominated', 'Nominated', and 'Received', circled in blue), 'Organization/Sponsor' (set to 'TAMUK'), and 'Purpose'.

4. Click **SAVE** to save your activity entry.

The screenshot shows the 'Edit Awards and Honors' form. At the top, there are navigation tabs: 'Activities', 'CV Imports', 'Reports', and 'Workflow'. Below the tabs are three buttons: 'CANCEL', 'SAVE', and 'SAVE + ADD NEW'. The form fields include: 'Type' (set to 'Award'), 'Nominated or Received?' (set to 'Received'), 'Award or Honor Name' (set to 'People's Choice Award'), and 'Organization/Sponsor'.

5. Data on some activities 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 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 [jennifer.vela@tamuk.edu](mailto:jennifer.vela@tamuk.edu) if you find any incorrect or incomplete data in these fields.

The screenshot shows the 'Scheduled Teaching' table. At the top, there are navigation tabs: 'Activities', 'CV Imports', 'Reports', and 'Workflow'. Below the tabs are three buttons: 'DUPLICATE', 'COMPARE', and 'ADD NEW'. The table has a header row with columns 'TERM, TERM AND YEAR' and 'YEAR, TERM AND YEAR'. The table contains six rows of data, each with a locked checkbox and a lock icon.

TERM, TERM AND YEAR	YEAR, TERM AND YEAR
<input type="checkbox"/> Spring	2023
<input type="checkbox"/> Fall	2022
<input type="checkbox"/> Spring	2022
<input type="checkbox"/> Fall	2021
<input type="checkbox"/> Fall	2021

## Compare (Merge) Activity Entries

1. Click on the Activities category where the activity can be found.
2. Check the boxes next to the activities (two or more) you wish to compare. Then select **COMPARE**.

The screenshot shows the 'Awards and Honors' interface. At the top, there is a search bar and a 'SEARCH' button. Below that are buttons for 'DUPLICATE', 'COMPARE' (circled in blue), and 'ADD NEW'. A 'SELECT COLUMNS' button and navigation arrows are also present. The 'Filters: None' section is visible. The main table has columns: 'NOMINATED OR RECEIVE...', 'AWARD OR HONOR NAME', 'ORGANIZATION/SPONSOR', 'MONTH, DATE', 'DAY, DATE', and 'YEAR, DATE'. Two records are shown, both with checked checkboxes in the first column. The first record is 'Nominated' for 'Staff of the Year Award' by 'TAMUK' in 'January' 2017. The second record is 'Received' for 'Staff of the Year' by 'TAMUK' in 'January' 2017. The checkboxes for both records are circled in blue.

<input checked="" type="checkbox"/>	NOMINATED OR RECEIVE...	AWARD OR HONOR NAME	ORGANIZATION/SPONSOR	MONTH, DATE	DAY, DATE	YEAR, DATE
<input checked="" type="checkbox"/>	Nominated	Staff of the Year Award	TAMUK	January	14	2017
<input checked="" type="checkbox"/>	Received	Staff of the Year	TAMUK	January	14	2017

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.

The screenshot shows the 'Compare Awards and Honors' interface. It has 'CANCEL' and 'CONTINUE' buttons at the top right. The interface is divided into two columns: 'Record 1 - Select All' and 'Record 2 - Select All' (both circled in blue). Each column has a 'Master Record' section with a radio button to 'Use as Master'. Below that are various fields for comparison, including 'Type', 'Nominated or Received?', 'Award or Honor Name', 'Organization/Sponsor', 'Purpose', 'Scope', and 'Brief Description/Explanation'. At the bottom, there is a 'Date' section with fields for 'Month\*', 'Day', and 'Year\*'. At the very bottom, there is a section for 'Original Source: Data Entry', 'Created: September 6, 2024', and 'Last Saved: September 6, 2024' for both records, which is circled in blue.

Field Labels	Record 1 - Select All	Record 2 - Select All
Master Record	<input checked="" type="radio"/> Use as Master	<input type="radio"/> Use as Master
Type	<input checked="" type="radio"/> Award	<input type="radio"/> Award
Nominated or Received?	<input checked="" type="radio"/> Nominated	<input type="radio"/> Received
Award or Honor Name	<input checked="" type="radio"/> Staff of the Year Award	<input type="radio"/> Staff of the Year
Organization/Sponsor	<input checked="" type="radio"/> TAMUK	<input type="radio"/> TAMUK
Purpose	<input checked="" type="radio"/> [Empty]	<input type="radio"/> [Empty]
Scope	<input checked="" type="radio"/> [Empty]	<input type="radio"/> [Empty]
Brief Description/Explanation	<input checked="" type="radio"/> [Empty]	<input type="radio"/> [Empty]
Date		
Month*	<input checked="" type="radio"/> January	<input type="radio"/> January
Day	<input checked="" type="radio"/> 14	<input type="radio"/> 14
Year*	<input checked="" type="radio"/> 2017	<input type="radio"/> 2017
Original Source: Data Entry	Created: September 6, 2024 Last Saved: September 6, 2024	Original Source: Data Entry Created: September 6, 2024 Last Saved: September 6, 2024

**TIP:** 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 a Third-Party system such as ORCID.

4. If you determine the records represent different activity entries, you 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 into a single record. First, select the best entry for each field (row) among all compared records.

Field Labels	Record 1 - Select All	Record 2 - Select All
Master Record	<input checked="" type="radio"/> Use as Master	<input type="radio"/> Use as Master
Type	<input checked="" type="radio"/> Award	<input type="radio"/> Award
Nominated or Received?	<input type="radio"/> Received	<input checked="" type="radio"/> Nominated
Award or Honor Name	<input type="radio"/> Staff of the Year	<input checked="" type="radio"/> Staff of the Year Award
Organization/Sponsor	<input checked="" type="radio"/> TAMUK	<input type="radio"/> TAMUK
Purpose	<input checked="" type="radio"/> Service, University	<input type="radio"/> [Empty]
Scope	<input checked="" type="radio"/> University	<input type="radio"/> [Empty]
Brief Description/Explanation	<input checked="" type="radio"/> An Employee of the Year award is a badge of honor employers give employees to recognize their efforts and contributions toward propelling the company's visions.	<input type="radio"/> [Empty]
<b>Date</b>		
Month *	<input checked="" type="radio"/> January	<input type="radio"/> January
Day	<input type="radio"/> [Empty]	<input checked="" type="radio"/> 14
Year *	<input checked="" type="radio"/> 2017	<input type="radio"/> 2017

Original Source: Data Entry  
Created: September 6, 2024  
Last Saved: September 6, 2024

Original Source: Data Entry  
Created: September 6, 2024  
Last Saved: September 6, 2024

If the records are for different activities, click cancel.

If the records refer to the same activity, select the best entry for each field to create the most accurate merged record, and click continue.

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 the 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 can click the



**Back** button to change the field entries you selected.

**Merge Awards and Honors**

Type  
Award

Nominated or Received?  
Nominated

Award or Honor Name  
Staff of the Year Award

Organization/Sponsor  
TAMUK

Purpose  
Service, University

Scope  
University

Brief Description/Explanation  
An Employee of the Year award is a badge of honor employers give employees to recognize their efforts and contributions toward propelling the company's visions.

Date  
Month \* January Day 14 Year \* 2017

BACK MERGE

- 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.

**Merge Awards and Honors**

BACK MERGE

Type  
Award

Nominated or Received?  
Nominated

Award or Honor Name  
Staff of the Year Award

Organization/Sponsor  
TAMUK

Purpose

Merge 2 records using the data on this screen. This action cannot be undone.

CANCEL OK

## Duplicate an Activity

- Click on the Activities category where the activity can be found.
- Check the box next to the activity you wish to duplicate.

**Publications**

Search... SEARCH Search Tips IMPORT

DUPLICATE COMPARE ADD NEW

SELECT COLUMNS

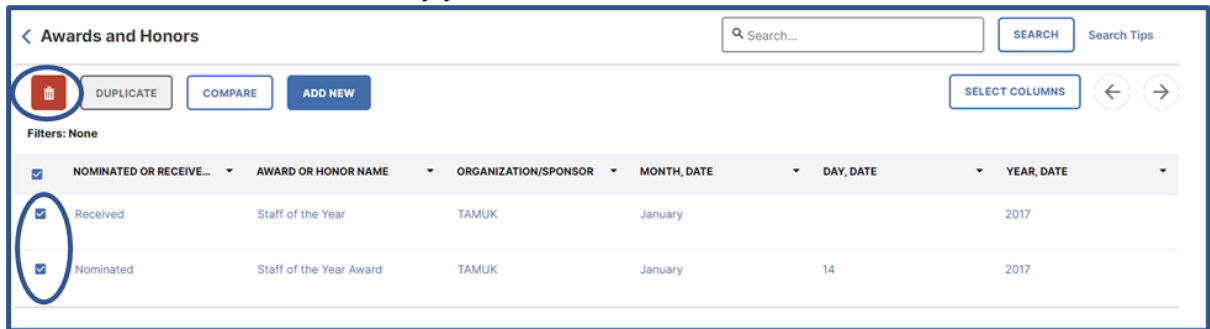
Filters: None

<input checked="" type="checkbox"/>	CONTRIBUTIO...	EXPLANATION ...	CURRENT STA...	TITLE OF CONTRIBUTION	IF THIS IS PART...	JOURNAL NAME
<input checked="" type="checkbox"/>	Journal Article	Published		The Behavior of Learning Disabled Adolescents in the Classroom		Journal of Educational Psychology

3. Make changes in the desired fields.
4. Click Save to your activity entry.

## Delete an Activity


1. Click on the Activities category where the activity can be found.
2. Check the box next to the activity you wish to delete.

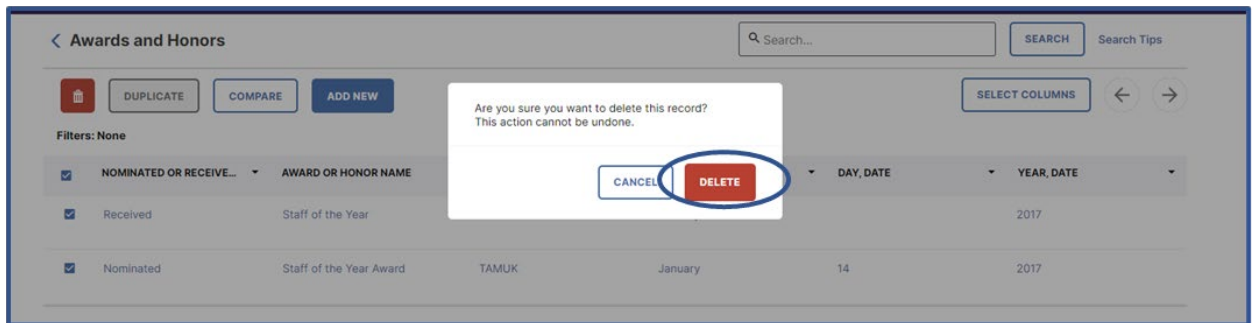


The screenshot shows the 'Awards and Honors' management interface. At the top, there is a search bar and a 'SEARCH' button. Below the search bar are buttons for 'DUPLICATE', 'COMPARE', and 'ADD NEW'. A 'SELECT COLUMNS' button and navigation arrows are also present. The main area displays a table with columns: 'NOMINATED OR RECEIVE...', 'AWARD OR HONOR NAME', 'ORGANIZATION/SPONSOR', 'MONTH, DATE', 'DAY, DATE', and 'YEAR, DATE'. Two rows are visible: 'Received' (Staff of the Year, TAMUK, January, 2017) and 'Nominated' (Staff of the Year Award, TAMUK, January 14, 2017). Both rows have a checked checkbox in the first column. A red trash can icon is circled in the top left corner of the interface.

<input checked="" type="checkbox"/>	NOMINATED OR RECEIVE...	AWARD OR HONOR NAME	ORGANIZATION/SPONSOR	MONTH, DATE	DAY, DATE	YEAR, DATE
<input checked="" type="checkbox"/>	Received	Staff of the Year	TAMUK	January		2017
<input checked="" type="checkbox"/>	Nominated	Staff of the Year Award	TAMUK	January	14	2017

**TIP:** 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 scene to delete the activity or click Cancel if you do not wish to delete it.



The screenshot shows the same 'Awards and Honors' interface, but with a confirmation dialog box overlaid. The dialog box contains the text: 'Are you sure you want to delete this record? This action cannot be undone.' Below the text are two buttons: 'CANCEL' and 'DELETE'. The 'DELETE' button is circled in red. The background interface is dimmed.