DIGITAL MEASURES

COLLEGE ADMINISTRATOR GUIDE TO MANAGING FACULTY DATA

West Virginia University
INFORMATION TECHNOLOGY SERVICES

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Contact your Digital Measures unit administrator if you need assistance. To find your unit administrator, view the **Digital Measures' Activity Insight Unit Contacts** TeamDynamix article. If you can't find your unit administrator, contact Brian Meredith at **brian.meredith@mail.wvu.edu**.

Refrain from using the built in Help button in Digital Measures. It is not an efficient way to receive assistance.

OVERVIEW

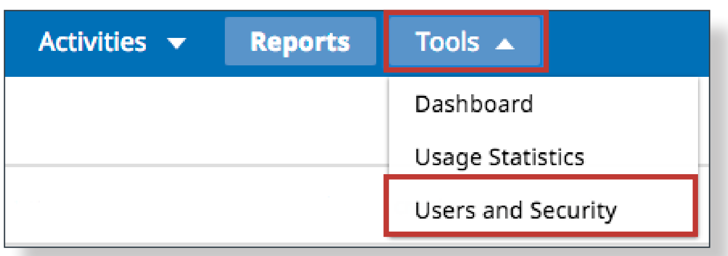
Digital Measures is the University's web-based faculty activity reporting system that improves the faculty review experience. Faculty can use Digital Measures to update their activity any time, and that information can be used for annual faculty evaluations, creating reports for accreditation and more!

As a college administrator or support staff member, you can manage a user's data, run personnel review reports and edit promotion and tenure data. To begin, go to **faculty.wvu.edu/policies-and-procedures/digital-measures** and click the blue **Login** button. Then, enter your WVU Login credentials.

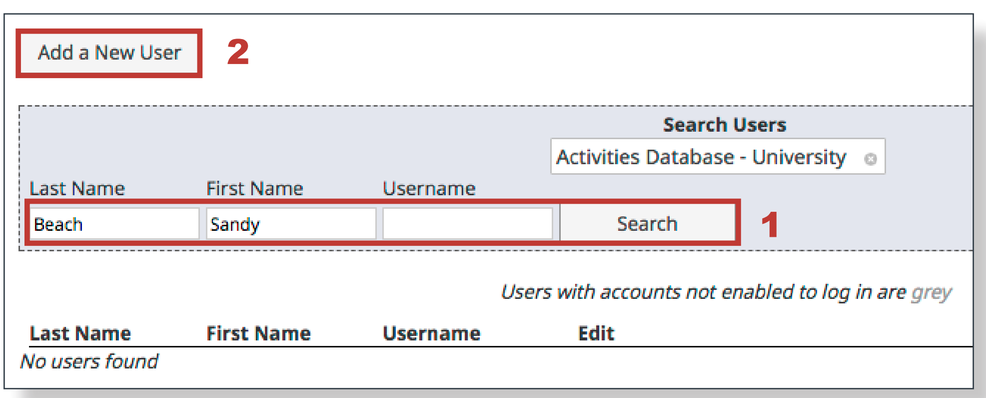
ADD A USER

The creation of Digital Measures accounts is the responsibility of college administrators, until integration with MAP is complete.

1. Select **Users and Security** from the Tools drop-down menu. You will be presented with a list of all users in your college or department, both enabled and disabled.

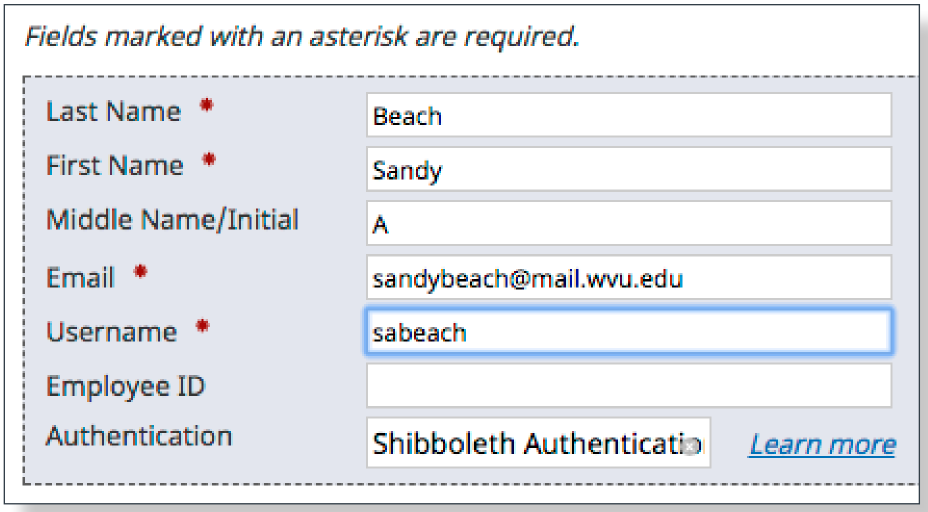


2. To verify that the person doesn't already have an account, enter their first and last name into the corresponding fields and click the **Search** button. After you have verified that they don't have an account, click the **Add a New User** button at the top of the screen.



3. Enter the new user's information in the required fields (marked with an asterisk). Enter their **Last Name**, followed by their **First Name**.

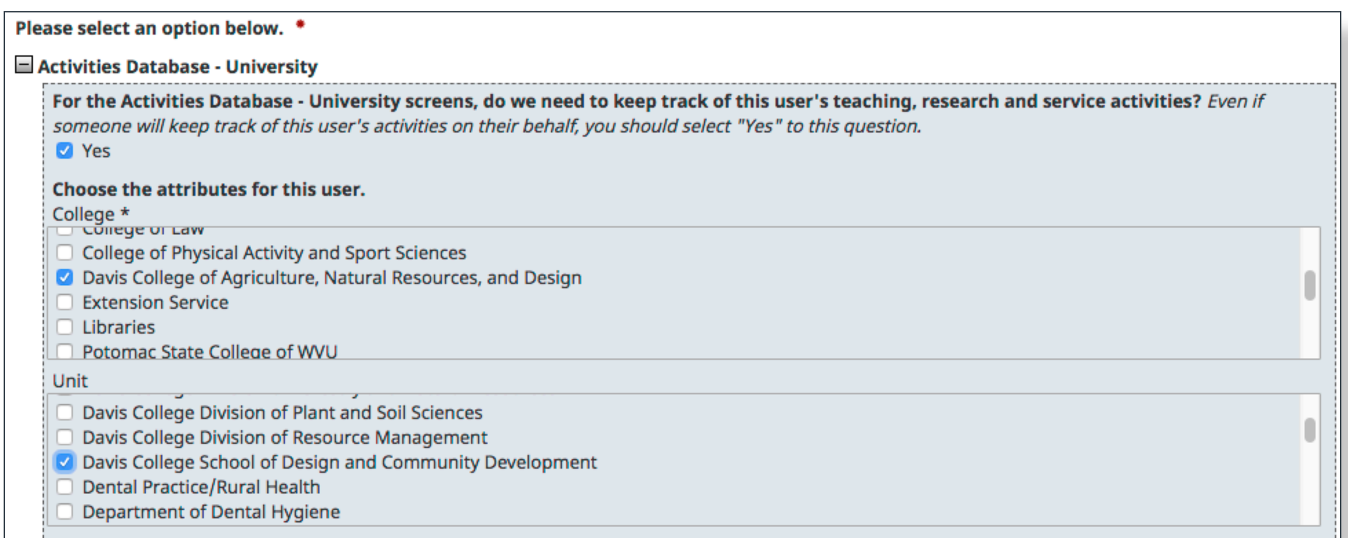
Note: When you enter an email address, the *Username* field automatically populates based on the email address you entered. Make sure to change the Username field for faculty, by entering their WVU Login username. They log in to Digital Measures using their WVU Login information.



4. If the account you are creating is for a faculty member (including Chairs), you must select their initial assignment and ensure that the 'track activities' **Yes** box is *checked*.

Note: If the account you are creating is for an administrative staff member, uncheck the *Yes* box and continue on to selecting a security role.

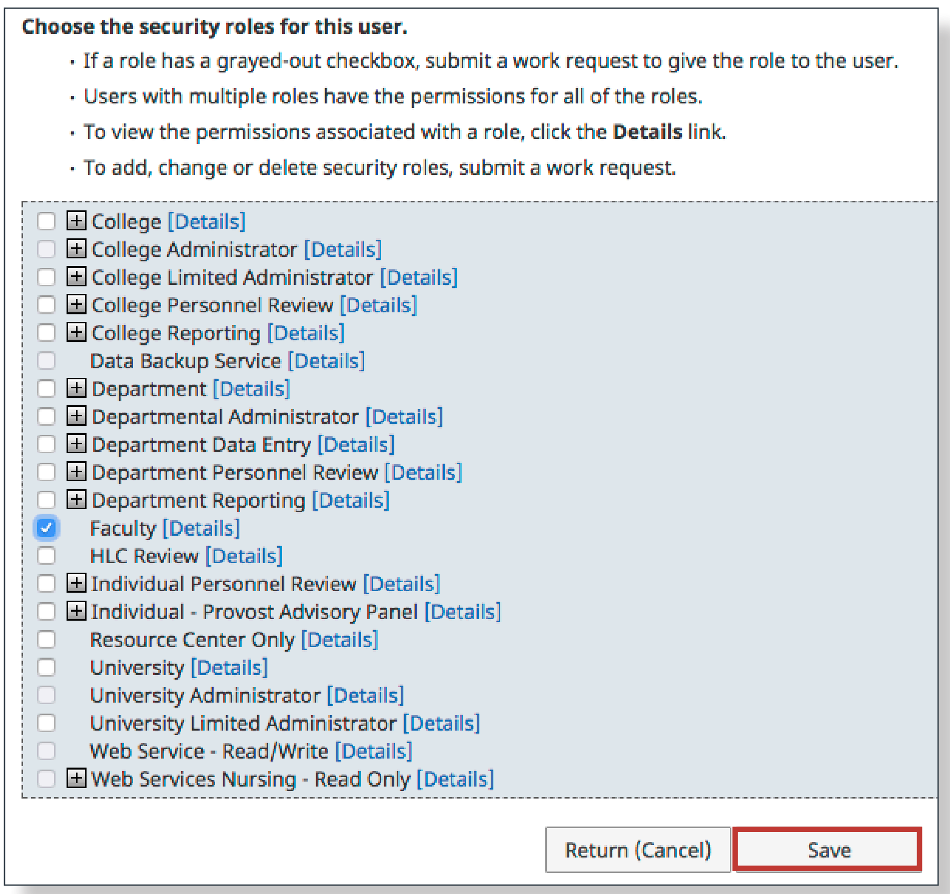
5. Select the new user's **College** and **Unit** (department).



6. Select appropriate security roles for the user. The following table outlines the common users and their associated roles. You can, and should under certain circumstances, assign more than one security role to a user.

Note: The default role for all faculty members should only be **Faculty**.

Type of User	DM Security Role(s)
Faculty	**Faculty**
Department Chair (has direct access to faculty files)	**Faculty + Department**
Administrative Staff	**Department**
Administrative Staff (can add, remove and change users)	**Departmental Administrator**

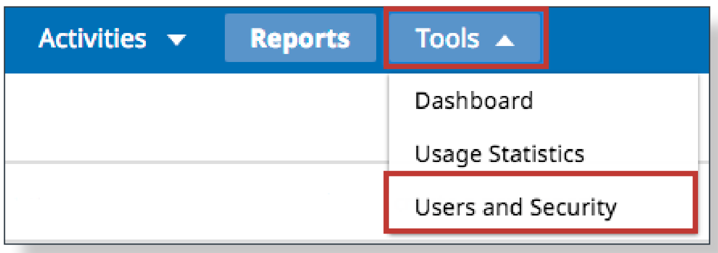


7. Click **Save** when finished.

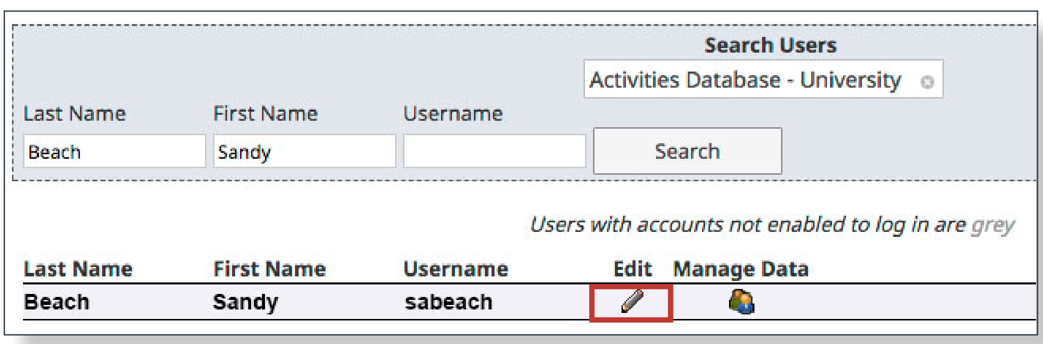
DISABLE A USER

As a general rule, you should NOT delete faculty accounts. According to recently implemented WVU policy, electronic faculty records must be kept for a period of five (5) years after date of termination or separation. Therefore, you should DISABLE faculty accounts for faculty that are no longer with the University. Disabling an account retains all data for the account, allowing accurate historical reports to be prepared

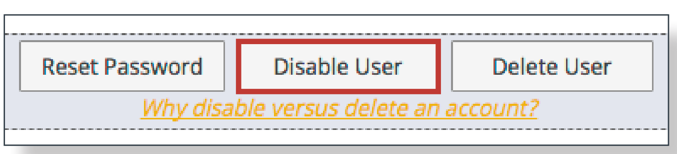
1. Select **Users and Security** from the Tools drop-down menu. You will be presented with a list of all users in your college or department, both enabled and disabled.



2. Search for the user by entering their **Last Name** and **First Name**, and click the **Search** button. Once the user account is populated, click the **Edit pencil icon** next to their username.

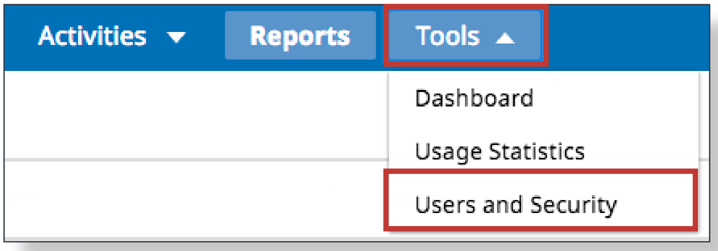


3. At the top of the account, click the **Disable User** button.

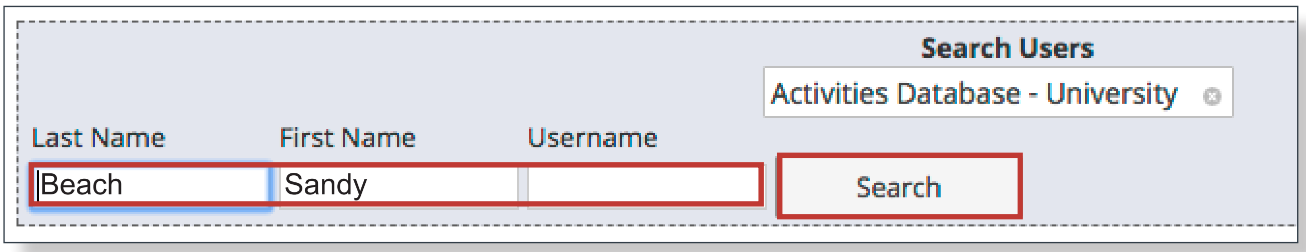


CHANGE USER SECURITY ROLES

1. Select **Users and Security** from the Tools drop-down menu.

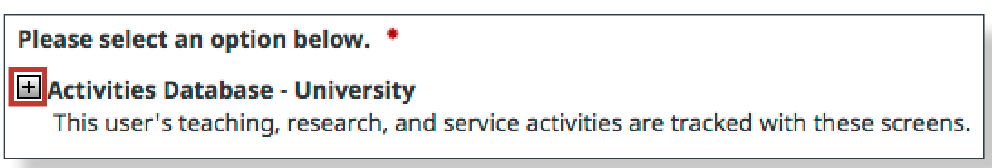


2. Search for the user by entering their **Last Name, First Name** or **Username**. Then, click the **Search** button.



3. Click on the **Edit** pencil icon next to their username.

4. If the *Activities Database - University* section isn't already expanded, click on the **plus sign** to expand it.

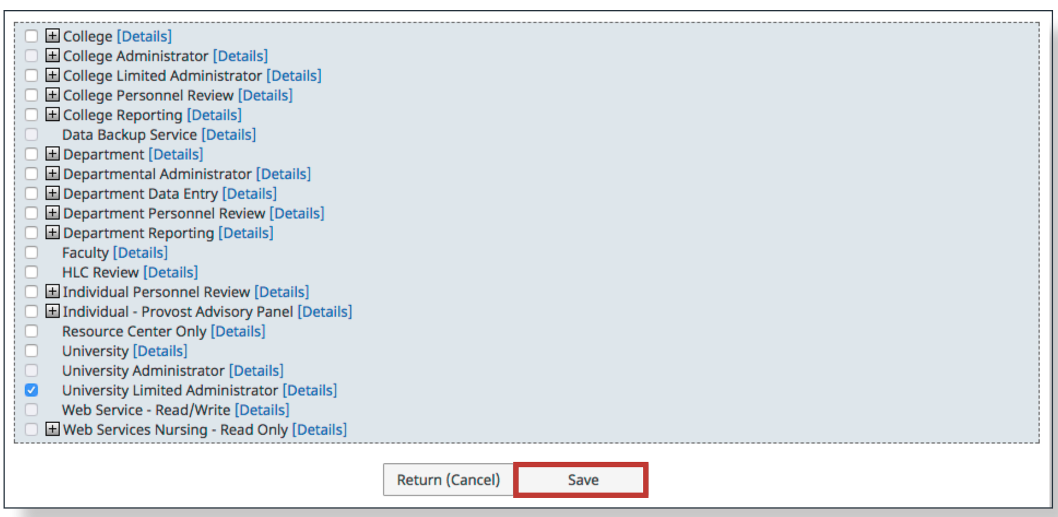


5. Select the **box** next to the security role category you would like to grant to the user. Then, click on the **plus sign** next to that role category to view the role sub-categories. Select the **box** next to the sub role category they should be given. To view the permissions associated with a role, click on the **Details** link next to it. Click **Save** when making changes.

Most faculty should only have the *Faculty* box selected. Those serving on a unit or college evaluation committee should also have the Department Personnel Review or College Personnel Review box selected. Make sure to update security roles as committee assignments change.

Note: It's critical that administrators update security roles at the end of every cycle.

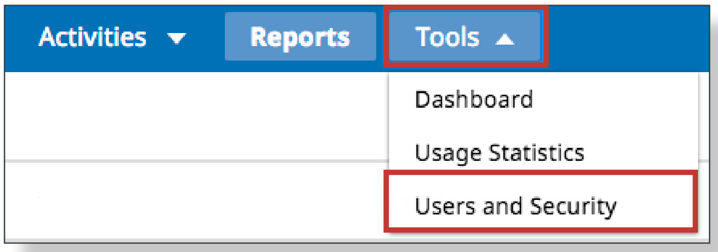
Faculty Activity/Assignment	DM Security Role(s)
Department Chair (has direct access to faculty files)	**Faculty + Department**
Department Review Committee (P&T/ annual)	**Faculty + Department Personnel Review**
College Review Committee (P&T/annual)	**Faculty + College Personnel Review**



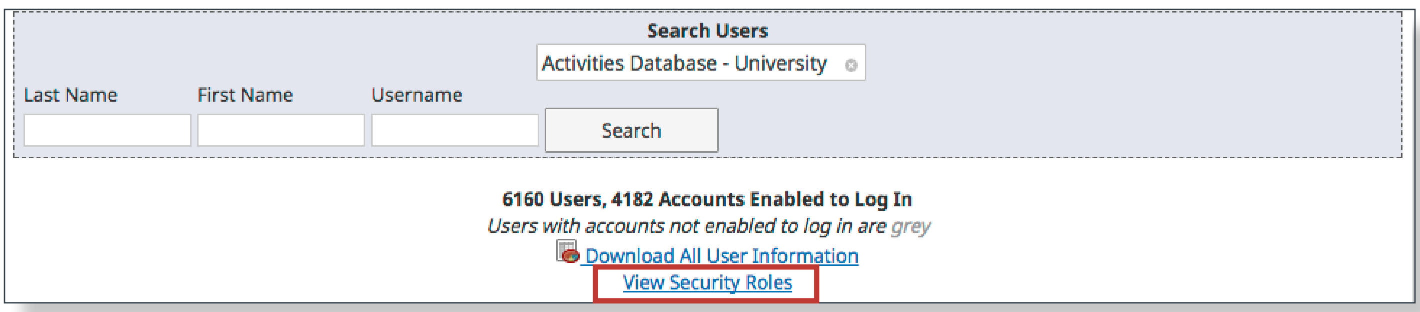
SECURITY ROLE AUDITS

Although central administration periodically audits high level account permissions, you should also periodically audit the security roles in your department to ensure that users do not have permissions they are not entitled to. Regular auditing will preserve the integrity of the system.

1. Select **Users and Security** from the Tools drop-down menu.

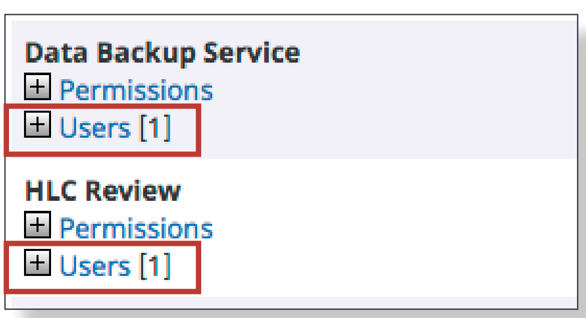


2. Click the **View Security Roles** link.



3. Scroll through the list of security roles and expand the *Users* link under each category to see all users with that security role designation.

Note: To change a user's security role, refer to the *Change User Security Roles* section above.

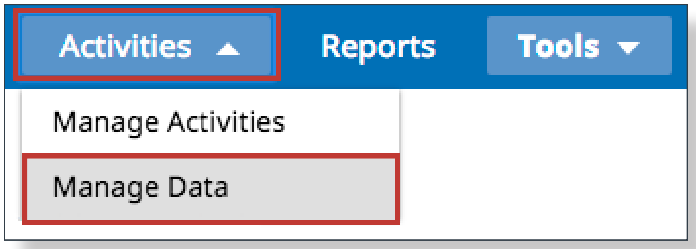


MANAGE USER DATA

Accessing and managing a user's file allows you to directly manage and edit a user's data as though they were managing it themselves. There are two different ways you can manage user data.

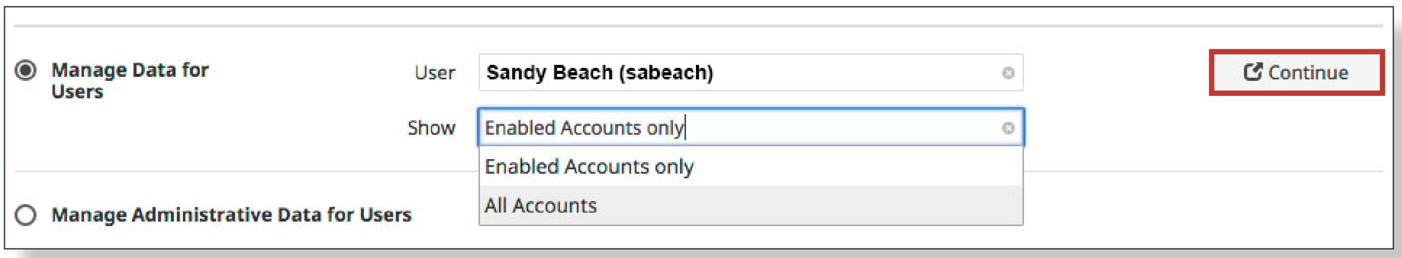
Manage Data

1. Select **Manage Data** from the Activities drop-down menu.

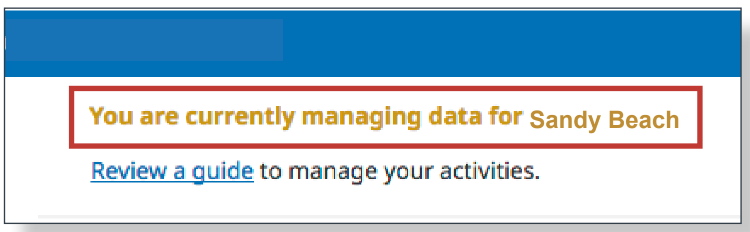


2. Type in the **name** of the user for which you want to manage data. Once the name has populated, select it and click the **Continue** button.

Note: You must click the *Show* drop-down menu and select **All Accounts** to view user accounts that have been disabled.

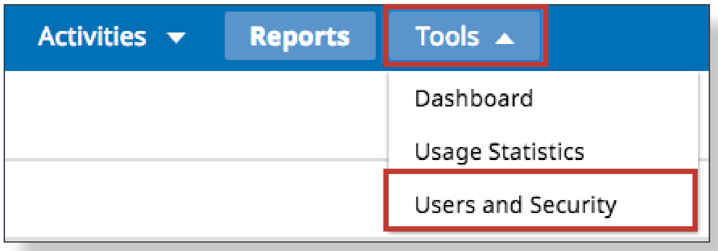


3. You will be taken to the Manage Activities screen for that particular user. To ensure you are managing data for the correct user, look at the message at the top of the page appearing in gold.

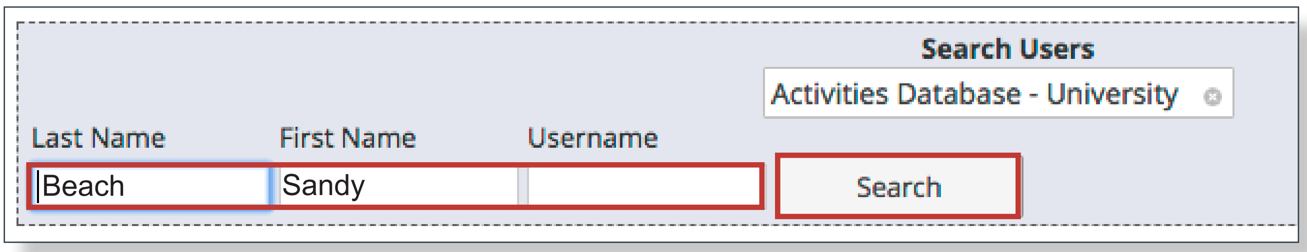


Users and Security

1. Select **Users and Security** from the Tools drop-down menu.

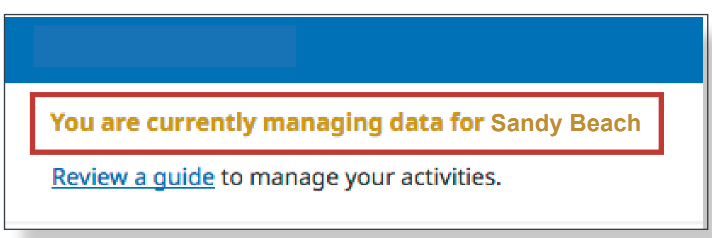


2. Search for the user by entering their **Last Name, First Name or Username**. Then, click the **Search** button.



3. Click on the **Manage Data** people icon next to their username. A new window will open.

4. You will be taken to the Manage Activities screen for that particular user. To ensure you are managing data for the correct user, look at the message at the top of the page appearing in gold.

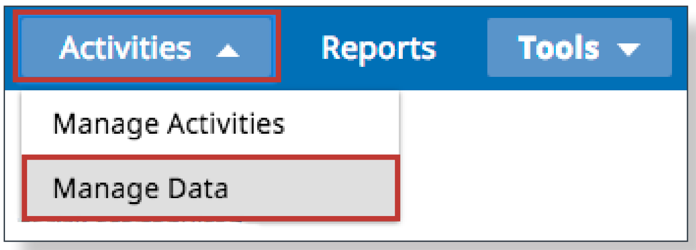


5. When you are done managing data for that user, ensure all changes are saved, and close out of that window.

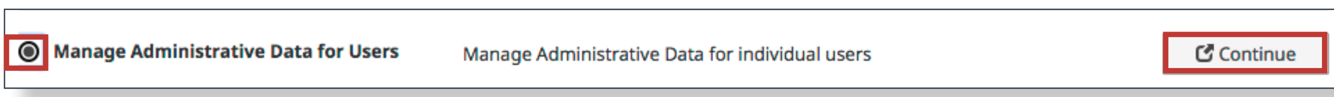
MANAGE ADMINISTRATIVE DATA

Every August, college administrators must copy all yearly data forward to the new academic year. Administrative Data typically doesn't change for most people from year-to-year, therefore a previous year's records can be copied from one year to the next.

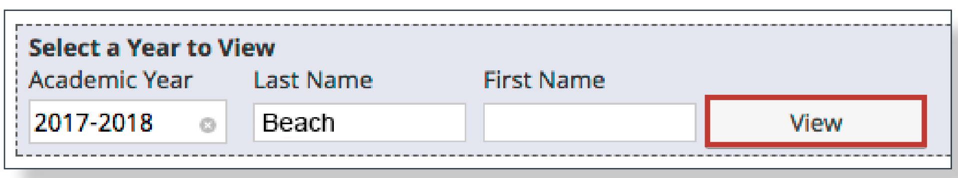
1. Select **Manage Data** from the Activities drop-down menu.



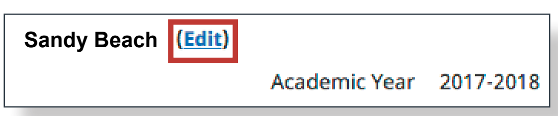
2. Select the **Manage Administrative Data for Users** radio button and click **Continue**.



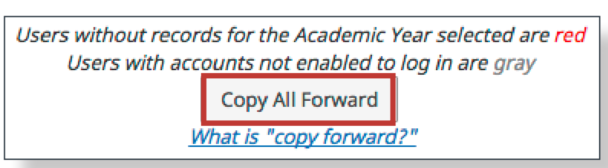
3. Select an **Academic Year** to review, then enter the name of the user for which you want to manage administrative data. Then, click **View**.



4. To edit the user's data, click the **Edit** link next to their name. When finished editing, click the **Save** button.



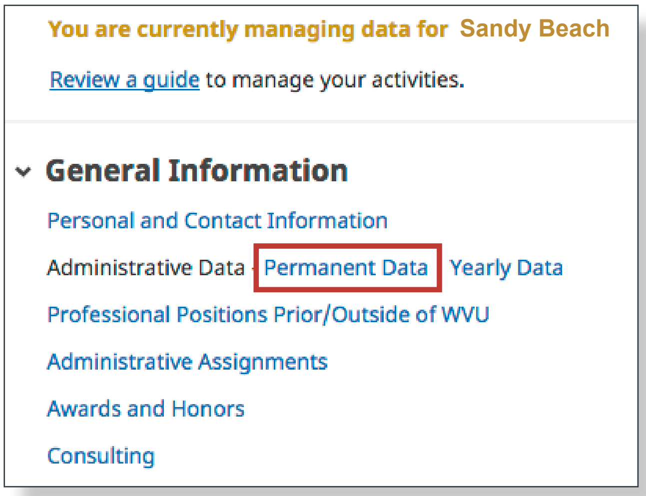
5. To copy Administrative Data forward to another academic year, click the **Copy All Forward** button at the top of the page.



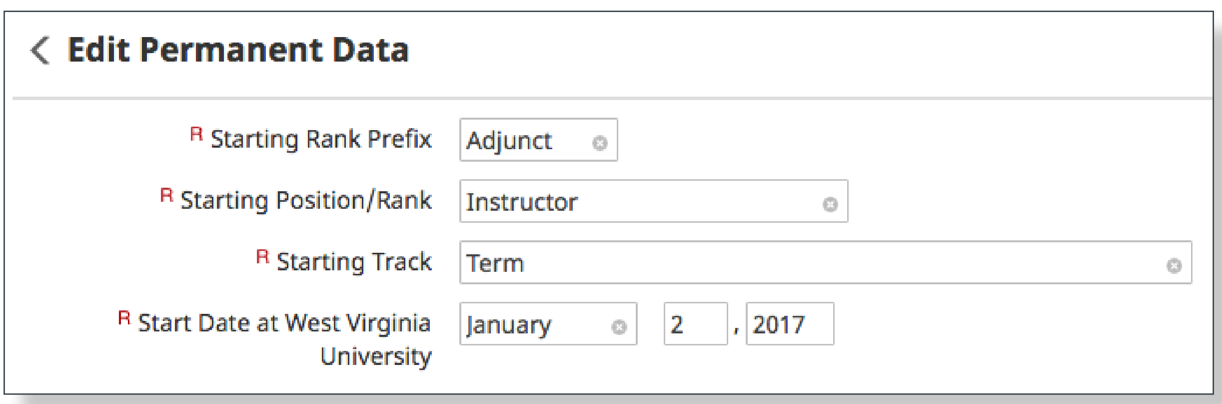
REVIEW PERMANENT DATA

Permanent Data MUST be reviewed for accuracy by administrators or supervisors. A superscript R will appear on the left side of data fields, meaning those fields are *read only* for Faculty. Faculty can view this data, but not change it.

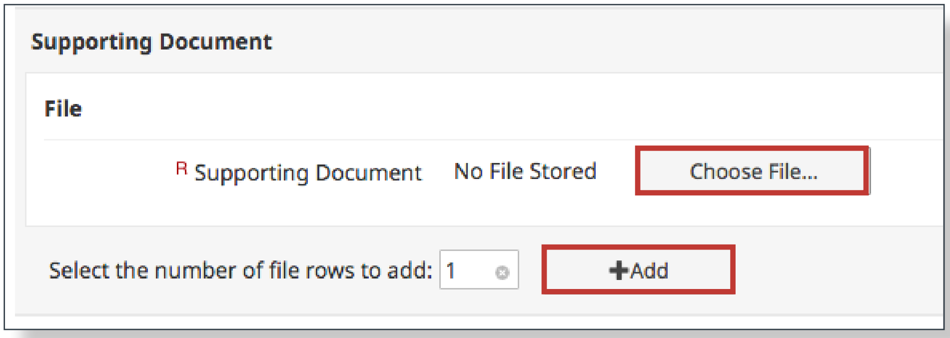
1. ***After*** completing the steps to access a user profile to manage data, select **Permanent Data** under the General Information category.



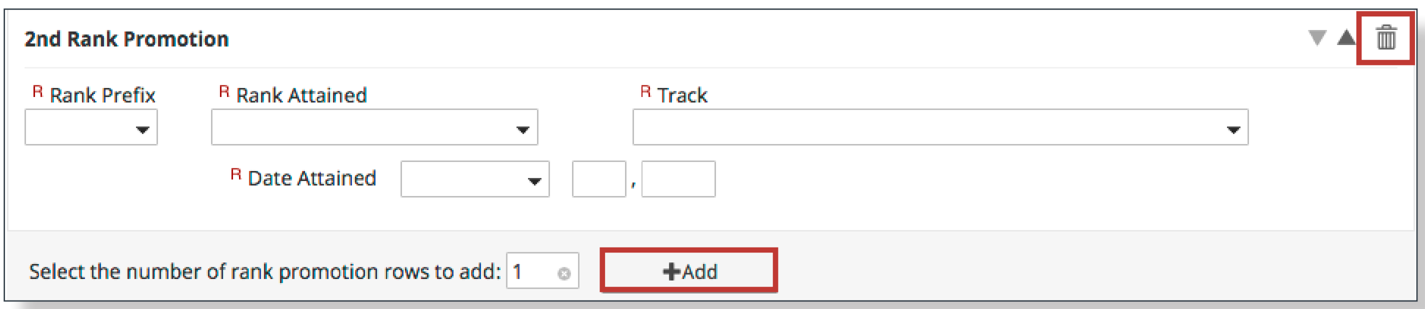
2. Enter or confirm that the **Starting Rank Prefix, Position, Track** and **Date** are all correct. Make changes if necessary.



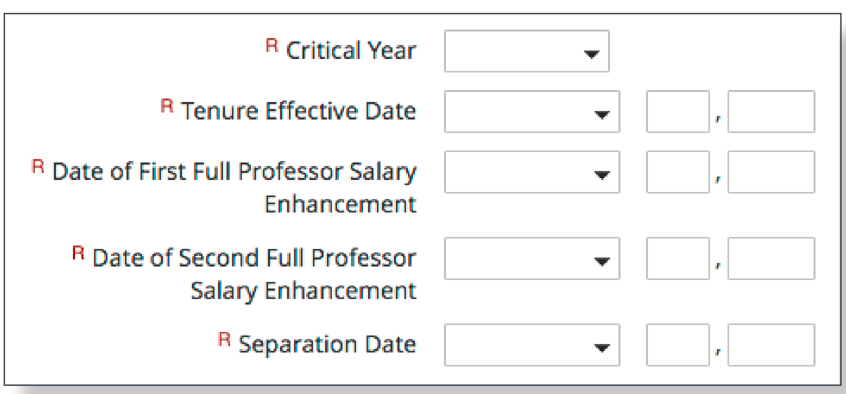
3. Click the **Choose File** button to upload a supporting document that proves the validity of the permanent data. If you want to upload additional supporting documents, click the **Add** button to add another row, and click the **Choose File** button again.



4. Set the **Rank Prefix, Rank Attained, Track** and **Date Attained** fields under the Rank Promotion section. To add another rank promotion, click the **Add** button. To delete a promotion, click on the **trash can icon** in the top-right (this won't show until the promotion has been added).



5. Enter or confirm the **Critical Year, Tenure Effective Date, First Salary Enhancement, Second Salary Enhancement** and **Separation Date** fields.



Note: These fields allow you to run reports to discover pertinent information, such as who has an upcoming critical year and if a professor is due to apply for a salary enhancement. The *Separation Date* field is important for filtering accounts per WVU's data retention guidance.

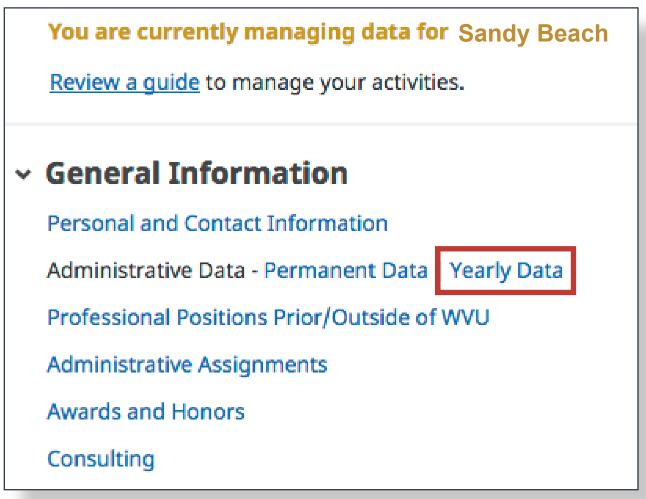
6. When you are finished entering and editing the information, click the **Save** button at the top of the page.

REVIEW YEARLY DATA

Yearly Data is how the system knows to include a faculty member in a given department. Everything in Digital Measures is built around yearly data, therefore it needs to be correct and up-to-date. Editing Yearly Data will also allow administrators to carry forward joint appointments to another academic year.

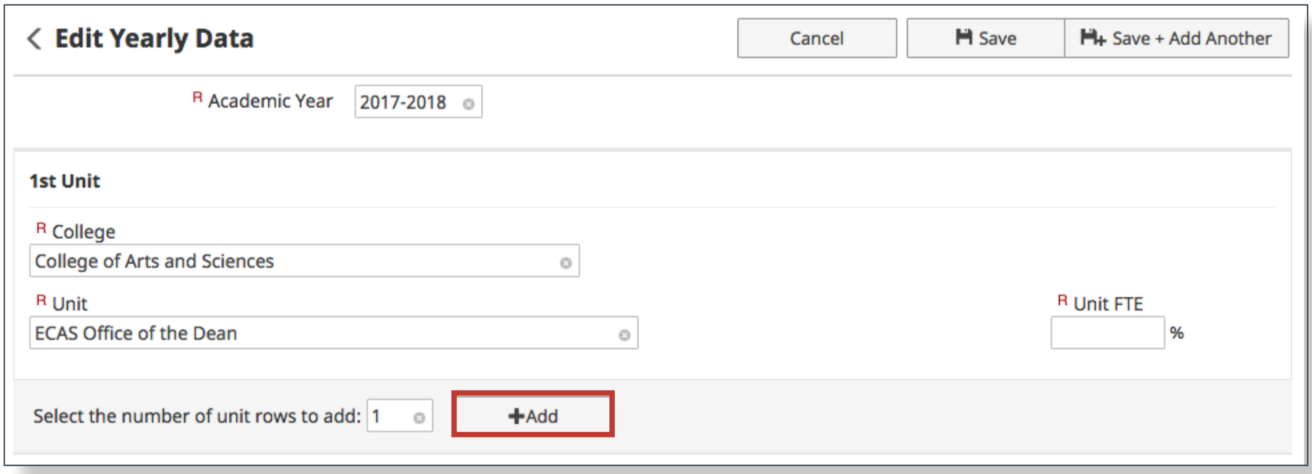
Note: If you have two units assigned to you in a given year (joint appointment), carry the joint appointment forward to new entries and do not remove it from any existing entries.

1. ***After*** completing the steps to access a user profile to manage data, select **Yearly Data** under the General Information category.

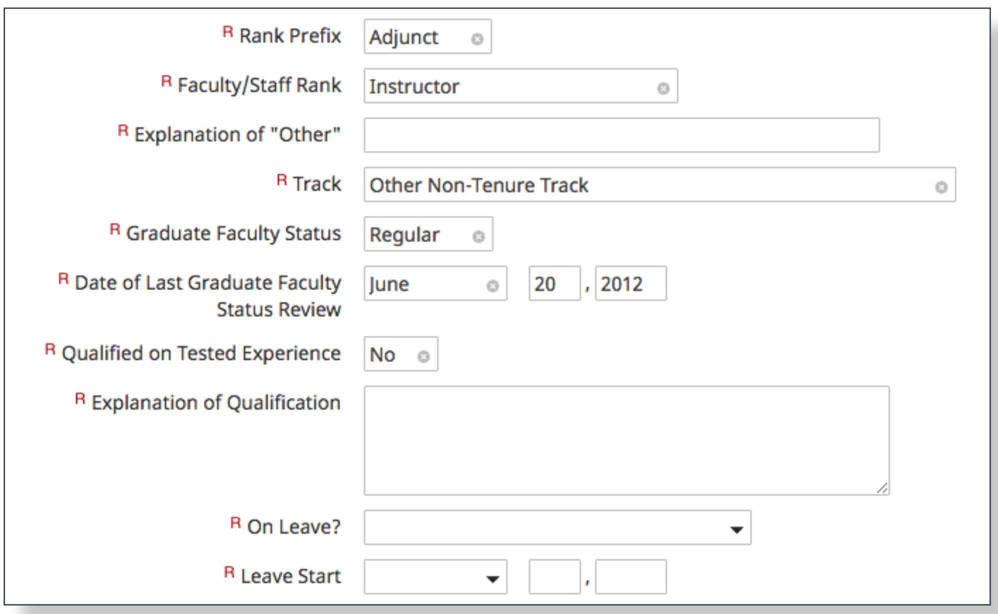


2. From here, you can complete three actions. Select the Item **term** (e.g. 2017-2018) if you would like to add or edit data for that term, click the **Add New Item** button to add information for a different term, or select a term and click the **Duplicate** button to carry that term's data forward to another academic year.

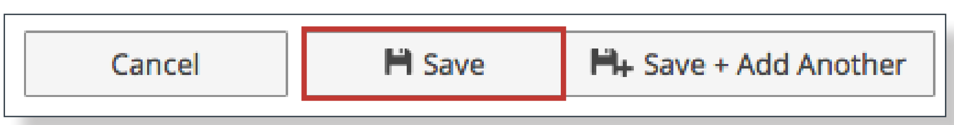
3. Ensure that you are looking at the data for the correct academic year, and confirm or edit the information under the Unit section. If the user has a joint appointment, click the **Add** button to add another Unit.



4. Enter or confirm the remaining fields of information.



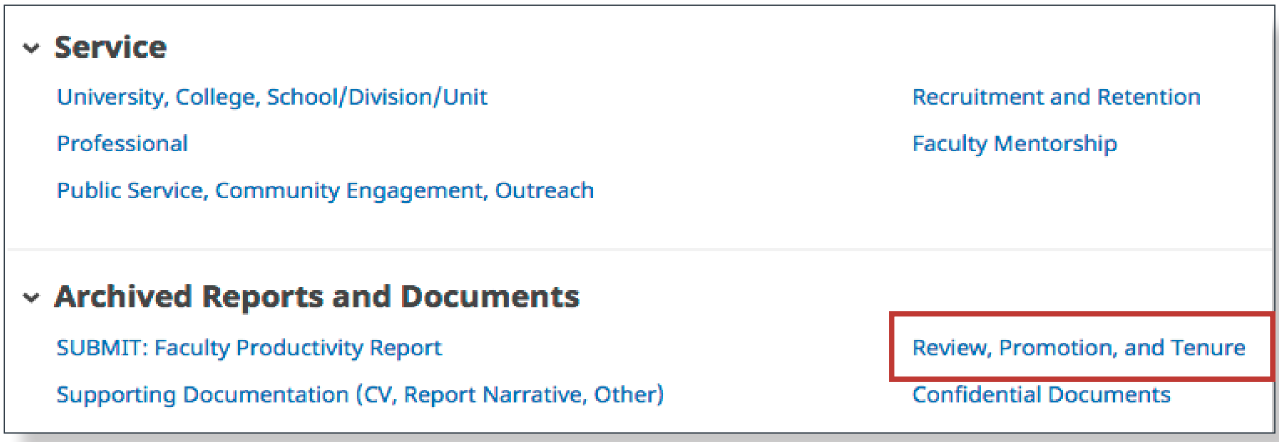
5. When you are finished making changes to a term's data, either click the **Save** button at the top of the page, or click the **Save + Add Another** button if you want to add information for another term.



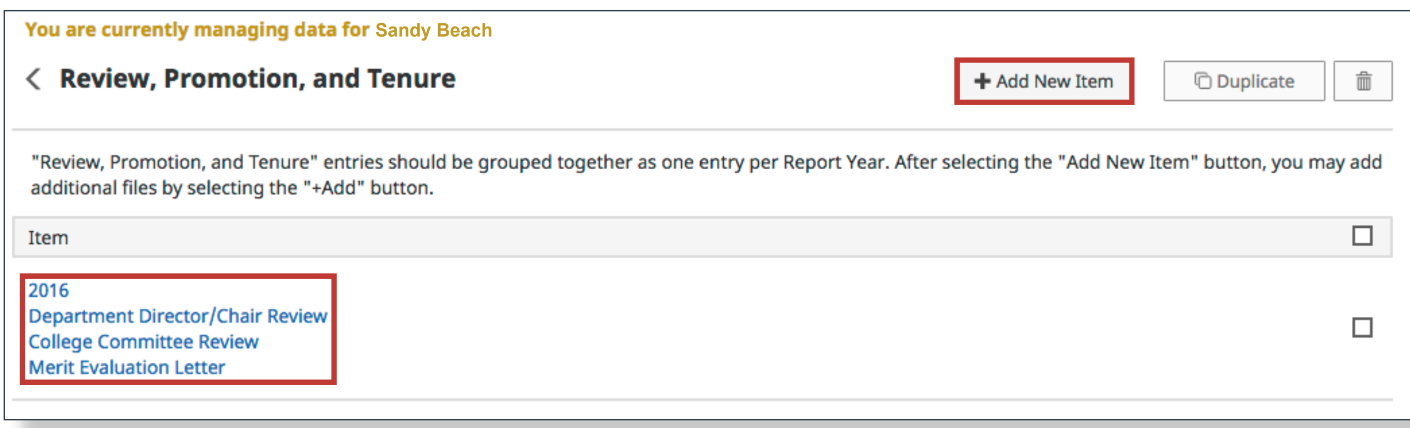
UPLOAD REVIEW, PROMOTION AND TENURE DATA

Under the Review, Promotion and Tenure section, an administrator can upload review-related data (e.g. department committee review, provost review, etc.).

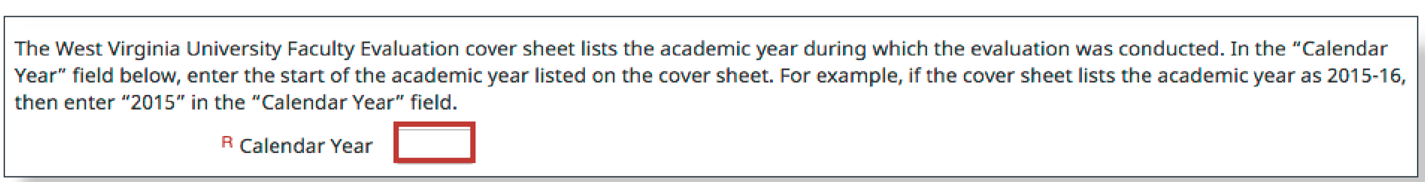
1. When you need to add a review, promotion or tenure document on behalf of a faculty member, you must manage their data, and select **Review, Promotion and Tenure** under the Archived Reports and Documents section in the *Manage Activities* menu.



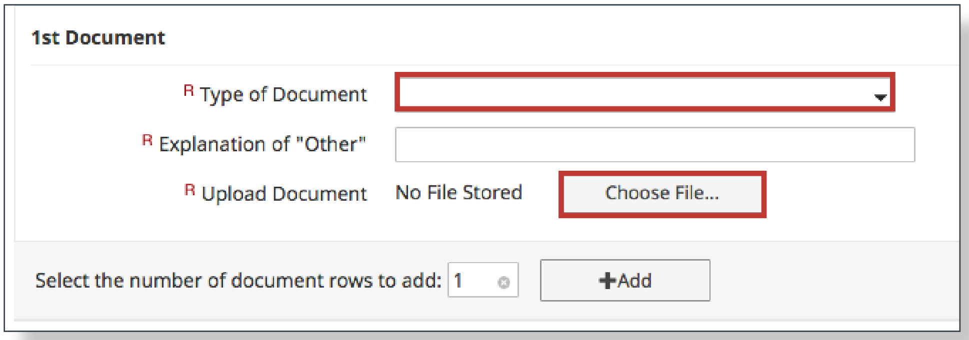
2. Click on the **item** you want to edit or review, or click the **Add New Item** button to add an item on behalf of the individual for a different academic year.



3. Enter the starting year listed on the faculty evaluation cover sheet in the Calendar Year field (e.g. If the cover sheet says “2015-16” write “2015”).



4. Add a document to the item. Select the type of document from the drop-down list and click the **Choose File** button to upload it. To add another document, click the **Add** button. To delete a document, click the trash can icon on the right side.



5. Select the **Type of Rating**, and select the correct responses for the **Teaching, Research, Service, Administrative** and **Clinical** fields. Then, select your recommendations and enter the committee's votes for promotion and tenure. Click **Save** when finished, or **Save + Add Another** to add another item on behalf of the user. Doing so allows a table of reviews to be generated by the system to assist in the review process. The information must be accurate, as it is crucial to a faculty's promotion and tenure outcome.