



**WILLIAM & MARY**

CHARTERED 1693

**The College of William & Mary**  
**Digital Measures ActivityInsight™ Faculty**  
**User's Guide**

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## GENERAL PROGRAM INFORMATION

### **DIGITAL MEASURES ActivityInsight™ FOR FACULTY (DIGITAL MEASURES or Digital Measures System (DMS) for short)**

DMS is a collection tool that houses information that would normally be included in curriculum vitae. The database structure allows these data to be arranged in output documents, including but not limited to, a vita, presenter biography, a department roster, or reports required by accrediting bodies. There is an [online demo](#) that will provide an overview of the system as well as a [training guide](#) online.

Many W&M faculty are actively involved in engaging students in a variety of exciting and meaningful ways. It is becoming increasingly important for faculty to document this good work so that it can be appropriately acknowledged in annual activity reports, tenure and promotion documents, and external reports to our various constituencies. DM will allow for this collection of faculty activities and allow administrators to view summary reports across department, school or college rather than collating information that comes in separately (on paper) from faculty. The College's acceptable use agreement is now available online.

The system is operational; however schools may further modify and customize as needed.

### **WHAT ARE THE ADVANTAGES?**

1. **24/7 Access:** Faculty can review or enter new data into the database from any computer with an internet connection; eliminate last minute stress of compiling data for annual reports, accreditation, etc.; if activities and accomplishments are recorded regularly throughout the year, reports are just a click away.
2. **Save Time:** Enter data only once and use it to generate different kinds of personal reports/documents (e.g. an annual Faculty Activity Report; a curriculum vitae; tenure and promotion documents); several areas allow for data imports from Banner or excel formats thus reducing faculty maintenance time; Pasteboard features available to copy from Word and Excel.
3. **Reduce Status Updates:** Instead of continually querying faculty for information about their activities, the unit head or dean can use the database to gather the information quickly and generate reports for accreditation bodies, faculty awards received, assessment, program reviews, nominations, etc.
4. **Future modifications** to this database will allow us to more easily identify areas of faculty interest, expertise, and research so that we can better facilitate collaboration across the College, publicize possible funding opportunities, and advocate for additional resources.
5. **No Disappearing Records:** Records do not disappear when personnel changes occur.



## AS A FACULTY MEMBER, WHEN SHOULD I LOOK AT DMS?

There are a few times each year that faculty should check DMS.

### 1. New Hire

- **Test your login:** You will use your W&M username and password to log on to your computer.
- **Review/complete information already entered** for you. You may review information by (1) generating existing reports using Run Custom Reports menu or (2) reviewing data in each screen under Manage Your Activities menu.

### 2. Beginning of Each Year

- **Administrative Data:** Confirm accuracy of data appearing on the Personal Contact Information, Permanent Data and Yearly Data forms. (New Yearly Data record will be created centrally at beginning of each academic year)
- **General Service:** Add new or remove expiring service commitments for the year.
- **Other Screens:** Adjust as needed for known changes.

### 3. Ongoing

- Enter activities such as publications, presentations, awards and other activities as they occur.

### 4. End of Each Semester

- **Verify teaching records:** DMS provides screens that record information about the courses you teach. This is important for accreditation and annual reporting. Verify imported Banner data each term and add additional information as needed. See [Scheduled Teaching \(Banner Imports\) Screen](#).

Note: There are also data screens for “Academic Advising,” “Directed Student Learning,” and “Non-Credit Instruction Taught” that you are welcome to appropriate.

## GENERAL ASSISTANCE

DMS implementation is a joint effort among all the schools. Each school has a designated administrator.

Arts and Sciences	Carol MacVaugh, Planning Analyst A&S/EIS <a href="mailto:camacv@wm.edu">camacv@wm.edu</a>
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**NOTE:** Use of the term “college” or “university” refers to The College of William and Mary. The term “school” refers to the five individual schools (A&S, Business, Education, Law and VIMS).



## ACCESS TO DIGITAL MEASURES

Contact your school's administrator to request system access.

Faculty can access DMS from any internet connected computer at [www.digitalmeasures.com/login/wm/faculty](http://www.digitalmeasures.com/login/wm/faculty). When prompted (see screen below), log on with your W&M user ID and password. You will not need a separate password to access DMS.

Invalid password issues should be reported to Technology Support desk. Errors regarding "no account found" should be reported to your school's administrator.

The screenshot shows the William & Mary Central Authentication Service login page. At the top is the William & Mary logo and the text "WILLIAM & MARY CHARTERED 1693". Below this is the heading "CENTRAL AUTHENTICATION SERVICE". There are two input fields: "WMuserid:" and "Password:". Below the password field is a checkbox labeled "Warn me before logging me into other sites". A green "LOGIN" button is centered below the checkbox. At the bottom, there is a message: "The service you are attempting to access requires that you authenticate using William & Mary's Central Authentication Service. For security reasons, please logout by closing your web browser when you are done accessing services that require authentication." Below the message are two links: "About CAS" and "Need help with your WMuserid or Password?".

Session Time Out: Users who log in to DMS will automatically be logged out after 90 minutes of inactivity. Prior to being logged out, the user will be presented with a warning through which they can refresh their session if they are still working. This warning prompt appears 5 minutes before the session is set to log the user out. This step is taken to protect the security of the user's account.



## BASIC MENU SCREEN

Once you log in, the following DMS screen will appear.

Click here - Tips for managing your data including use of RapidReports and PasteBoard.

Welcome, Test Test! ▾ Search All Activities...

**Manage Activities**

- Rapid Reports
- PasteBoard
- Run Reports
- Help

[Review a guide](#) to manage your activities.

**General Information**

- Personal and Contact Information \*\*
- Administrative Data - Permanent Data | Yearly Data \*\*
- Position History
- Awards and Honors
- Consulting
- Education \*\*
- External Connections and Partnerships
- Faculty Development Activities Attended
- Licensures and Certifications
- Media Contributions
- Professional Memberships
- Workload Information

**Teaching**

- Academic Advising
- Directed Student Learning (e.g., theses, dissertations)
- Non-Credit Instruction Taught \*\*
- Scheduled Teaching (Banner Imports)
- Scheduled Teaching (Other)

**Scholarship/Research**

- Artistic and Professional Performances and Exhibits
- NSF Biographical Sketch
- Contracts, Grants and Sponsored Research
- Publications
- Intellectual Property (e.g., copyrights, patents)
- Presentations
- Research Currently in Progress

**Service**

- General Service

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Privacy Policy

Communicate with your administrator or DM. Any request for system changes or new reports must first be routed through your school and coordinated with other schools on campus

Digital Measure's statement on their commitment to your privacy can be viewed online

\*\* Many of the data fields in these screens are pre-populated by campus data downloads or administrative staff. Faculty can view data but will not be able to select the data field for editing (see Appendix A at the end of this user's guide for requesting corrections to such fields).



## USING THE SYSTEM

The more faculty who use DMS and the more data they enter, the more complete, accurate, and useful all the reports will become. Faculty should enter their activities for the current academic year, and then maintain the data on a going-forward basis; entering historical data at any time, at one's own pace. The following highlights DMS navigation.

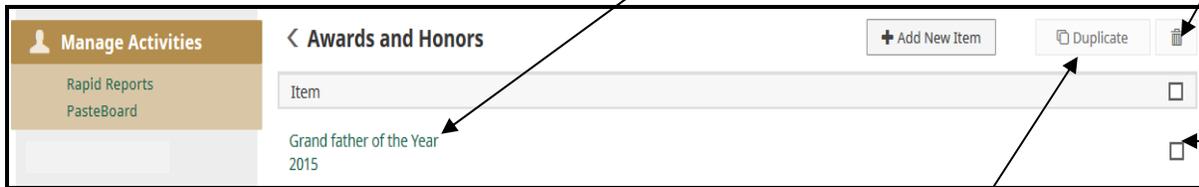
### “Add New Item”

When entering your data, you may notice that most of the screens will have an option that says “Add New Item”. Choose this button to enter your data (see also COPY/Duplicate section below).

To add a new record,  click the button

### “To Edit or Delete an Old Item”

To edit an old item that appears in the “Add New Item” screen, click on the **title** of the listed item itself. If you would like to delete an item, check the box to the far right of the title of the entry, then click on the trash can icon in the top menu bar. If you choose to delete a record, you will be prompted about your decision. DMS allows you to save partial records and data, for this you use the “Save” option in the forms.



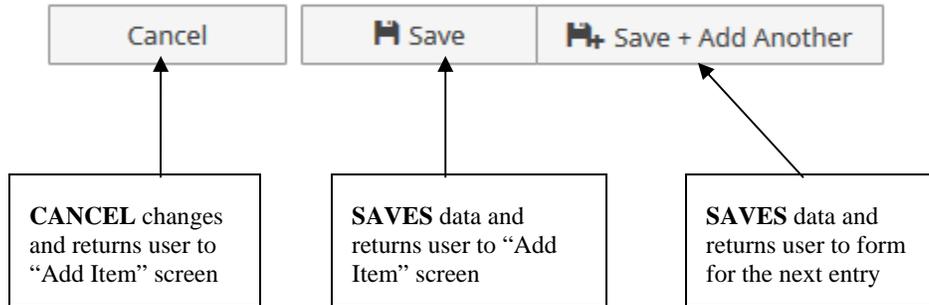
Trash Can Icon = Delete

Check the box for item & then Click on Trash Can Icon to delete.

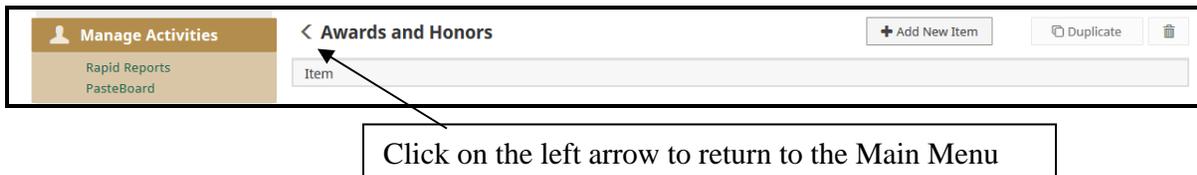
“Copy/Duplicate” To reduce data entry time, use the Duplicate  button to duplicate entries that require only a few changes. For example, if you enter a Journal Article-In-house on the Intellectual Contribution screen and later publish a similar article in a Journal Article-Academic Journal, you can copy your original entry and simply adjust dates/type as needed. This eliminates the need to re-key all data elements to create the second journal entry.



**"Cancel," "Save," and "Save and Add Another" Buttons.** When you have completed a form, you have two options to save your data. If you click on the "Save" button, *your data will be saved* and you will be returned to the "Add Item" screen. If you click on the "Save and Add Another" button, your information will be saved and the form will clear for input of another item. "Cancel" will take you to the "Add a New Item" screen if you are entering a record.



## "Return to Main Menu"



To return to the Main Menu, click on the arrow to the left of the Tab Heading. Clicking on this Arrow also functions as a "Cancel" button when you are within an existing or new entry and want to stop entering data. It will not save any new data in existing entries you when exit out of the entry using this method, but it will not delete previously saved data.

## Drop Down Menus – Use of "OTHER"

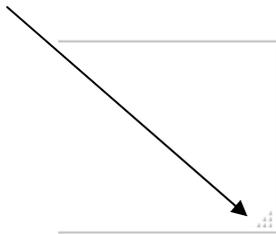
Undoubtedly there are faculty activities which will not fit into existing categories/types. In the short term, find the most appropriate category or make use of the "Other" and "Explanation of 'Other'" categories to document this activity. Though DMS has been extensively customized to include most common activities, it's impossible to encompass the full range of faculty activities within the College.



## Text Entry

Many screens provide text boxes for data entry. Text boxes generally will allow you to input as many characters as you would like. Text boxes are freeform and do not have any data validation built in. Text boxes are expandable.

You may see the dotted triangular shape in the bottom right corner of the text box which you can **click, hold and drag** to the desired viewing size. This text box will return to its default size once saved.



You may also see **vertical scroll bar with arrows** on the right side of the text box. This text box will automatically expand as you type. You will need to scroll up and down to view the entire text box. The scroll bar is activated as you type. If not necessary for the entered text, it will be **greyed out**.



## Required Data Fields

Required data fields have a **RED** asterick beside them: \* ; these text data fields must be completed in order to save the entry.

* Award or Honor Name	<input type="text"/>
Organization/Sponsor	<input type="text"/>
* Status	<input type="text"/>



## Restricted Data Fields

Restricted Data Fields have a "  " next to them to indicate no attempt should be made to enter or alter the data in that field.

 Percentage of Responsibility

 Cross Listed Home Department

 Official Enrollment Number

 Minimum Credit Hours

## Dates

Make sure you enter dates (at least year field) for all activities. Undated records will, by default, always appear in a report, regardless of the report date range requested. Additionally, undated activities will appear ahead of any dated activities. If no dates are added, the CV will order itself alphabetically. **\*Note that "Date" is sometimes a required data field on some Tabs (Publications Tab for example) and in those records you will not be able to save the new entry or updated entry until at least the year data field is entered.**

- One Day Activities: Leave the start date blank and specify the end date.
- Activities in Progress: specify the start date and leave the end date blank.
- Multi-day Completed Activities: Complete start and end date.

Examples of Reporting Impact:

Start Date of January 1, 2008, but no End Date: Entry will be included in a report with the date range of January 1, 2009 to December 31, 2009. This happens because the record is considered to be ongoing, even if the Start Date does not fall between the report date ranges.

Start Date of January 31, 2009: Entry will appear in a report generated with date range between January 1, 2009 and December 31, 2009.

End Date of January 31, 2009: Entry will only be included in a report where January 31, 2009 falls between the report ranges. Example: a January 1, 2009 - December 31, 2009 report range would include the record.

## Font/Characters

DMS does not show characters from the "Symbol" font, as it is not Unicode compliant. Any character pasted in as a "Symbol" from the "Symbol" font will be converted to a Unicode font character with the same character code, rather than what you were expecting. You may use Word's "Insert Symbol" command, just be careful to select from the extended character set of a Unicode font such as Arial™. You may also use Character Mapper or something similar to pick the appropriate symbol in a Unicode font (i.e. Arial™), then copy and paste the symbol into the field.



## FACULTY INFORMATION

This tutorial for DMS was created to help faculty and administrative staff become familiar with the DMS System. This guide DOES NOT cover each data field that faculty need to populate for each school. Ask your school's administrator which information fields you need to complete. DMS is a powerful tool to help build a professional portfolio and can serve each faculty member beyond the requirements for annual evaluation. Faculty members are encouraged to explore how DMS can best meet their needs.

The options found when selecting "Manage Your Activities" include four general categories of information: **General Information; Teaching; Scholarship/Research;** and **Service**. These are generally self explanatory. However, some additional information for several of the screens appears below.

### GENERAL INFORMATION

#### Personal and Contact Information (PCI)

The PCI screen contains several data fields that cannot be edited. These fields represent data completed during user creation or the Banner data upload. Refer to Appendix A if changes are needed to read-only fields. Add or revise other data as needed such as Office Phone, Biography, Teaching Interests, etc.

#### Administrative Data - Permanent Data

These data include your starting rank, start date, and information about your rank levels held. The data should mirror data in Banner. However, please note that until recently, Banner did not track historical promotion information.

Populating blank fields is encouraged but revising fields should be discussed with your school's administrator as source data may also require adjustment.

#### Administrative Data - Yearly Data

These data will provide your rank, tenure, and leave as populated from Banner each term.

**NOTE:** School of Business faculty will see additional data fields applicable to AACSB reporting needs. Further instruction on these fields will be available from your DMS administrator.

#### Position History

Your work experience, both academic and non-academic, should be documented here. You may include any temporary/term administrative assignments as additional entries here. Adding administrative assignments on this screen will allow them to also appear on your vita.

**NOTE:** *For current position(s), you should leave End Date blank. DMS assumes "-Present" date range when the end date is blank.*

#### Awards and Honors

Faculty should regularly update awards and honors received. The month and year of the award must be reported. If an Artistic/Creative Merit award, please provide information on the work that was cited in the "Description of Faculty Work."

Honors and awards that include a monetary component may be included here if the honor is most important (e.g.: Fulbright, Nobel) or under Contracts, Grants, and Sponsored Research if the monetary



component is most important (e.g.: NSF young investigator award, MacArthur Fellowship). If you list the award here, please provide a monetary estimate of the research value of your award. For example, salary and travel expenses to pursue research abroad would count while a monetary prize to you that you can spend on anything would not.

Elections in a professional society should be listed under General Service screen.

## **Consulting**

Faculty should add new items as needed to document work in the areas of academic, for profit organizations, government, litigation, and non-governmental organizations.

## **Education**

Your degrees awarded are populated for you. Any revisions or additions to your educational record should be submitted to your school administrator.

*NOTE: The Education Screen fields were initially populated in August 2011 through the annual faculty verification process required of all schools by the Office of Institutional Research. Records for new faculty will be updated when they begin employment at the College.*

## **External Connections and Partnerships**

Faculty may input, as needed, information on external relationships such as speaker, field trip, funding, and recruitment activities.

**NOTE:** Student recruiter is better documented to General Service screen.

## **Faculty Development Activities Attended**

Faculty development activities include any form of activities you have done to acquire additional knowledge or skills, other than formal coursework related to completion of degrees

## **Licensures and Certifications**

Any licenses, registrations and certifications can be entered in this template including, for example, teaching registrations, legal registrations or certifications such as Certified Public Accountant (CPA).

## **Media Contributions**

List only those contributions that involved your professional expertise and not your W&M affiliation.

## **Professional Memberships**

Faculty may enter memberships in professional organizations external to the College. Additional duties beyond simple membership, such as serving as officer or committee chair, should be reported in the General Service screen.



## Workload Information Screen

This screen allows faculty to input an annual update (each academic year). After faculty enter the first year they will be presented with **Add New Item**, **Duplicate**, or **Delete Icon** functions. The **Duplicate** function can be used to create additional academic year records.

< Workload Information		+ Add New Item	☒ Duplicate	🗑
Item				<input type="checkbox"/>
2014-2015				<input type="checkbox"/>

## TEACHING

### **Academic Advising**

Faculty will need to enter general information such as hours spent as well as information on graduate advisees.

### **Directed Student Learning (e.g., theses, dissertations)**

Faculty should enter information about student interaction such as independent study, dissertation chair/member, doctoral advisor, supervised research, etc. as provided in drop down menu for involvement type. Faculty *should* include student 93#. While not currently a required field due to historical data entry challenges, entering this unique ID allows for a more useful and accurate review of student experiences across campus.

### **Non-Credit Instruction Taught**

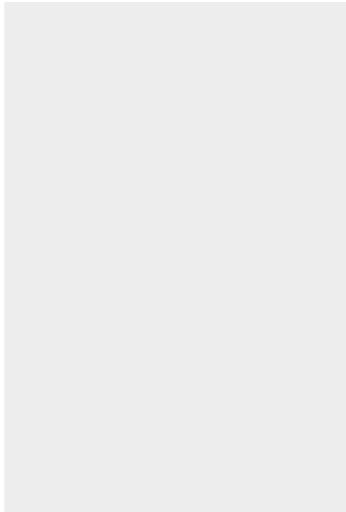
Faculty may enter additional student experiences at William & Mary that have not already been captured in the above categories (i.e. certificate programs, continuing education, guest lecture in a class, workshop, etc). All instruction outside of William & Mary should be listed under Service if uncompensated or Outside Employment or Consulting if compensated.

### **Scheduled Teaching (Banner Imports)**

Scheduled Teaching (Banner Imports): Entries are populated periodically from Banner and will include courses taught since the fall 2003 implementation of Banner. Once a course appears in this screen, you will be able to edit additional information about your courses as shown in the screen display on next page.



***Excerpt from Scheduled Teaching (Banner Imports):***



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New course preparation?

New format for existing course?

Describe any pedagogical innovations that you introduced into this course during the current year (e.g., international issues, computer applications, ethical analysis, new classroom techniques, etc.)

Describe any new teaching material (e.g., cases, videotapes, audiotapes, course modules, instructor manuals, test banks, or simulations) that you developed and/or implemented

Describe any activities in your course that enhanced student learning and/or student contact with the community (e.g., guest speaker, outside projects, field trips, field projects, etc.)

**Scheduled Teaching (Other)**

Scheduled Teaching (Other): Faculty may enter courses taught prior to Banner implementation (Fall 2003) or taught at other institutions.



## SCHOLARSHIP/RESEARCH

Scholarship and research activities will be collected using the following screens. While only a handful of fields are marked as required, faculty should complete as much information as possible to communicate their achievements. For example, Student 93# is not required at this time but we strongly encourage faculty to provide student 93# as that will aid the College in central reporting of undergraduate mentored research.

Faculty should become familiar with all contribution types available (via drop down menus) on these screens. It will be important to select the correct screen for data entry. Do not duplicate information between screens by recording the same instance in two screens.

**Manage Activities**

- Rapid Reports
- PasteBoard
- Run Reports
- Help

**Edit Publications** [Cancel] [Save] [Save + Add Another]

Contribution Type [dropdown]  
 Explanation of "Other" [text field]  
 Current Status [dropdown]  
 Title of Contribution [text field]  
 If this is part of a larger work (e.g., a chapter in a book), Title of Larger Work [text field]

**Authors/Editors**  
 Please order the authors/editors in the order of authorship/editorship.  
 Please either select a person from the drop-down list or enter their name in the input fields.

1st Author/Editor	First Name	Middle Name/Initial	Last Name	Institution/Company, if outside WM	Role
People at The College of William and Mary Test Test T: cjmavc	[text field]	[text field]	[text field]	[text field]	[dropdown]

Student? [dropdown] Student Level [dropdown] ID (93#), if Student at WM [text field]

Select the number of author/editor rows to add: 1 [dropdown] [+Add]

Editor(s) [text field]  
 Journal/Publisher/Proceedings/Publisher [text field]  
 City and State of Journal/Publisher [text field]  
 Country of Journal/Publisher [text field]  
 Volume [text field]  
 Issue Number/Edition [text field]  
 Page Numbers or Number of Pages [text field]  
 Web Address http:// [text field]

**Callout 1:** Faculty *should* include student 93# when entering students. While not currently a required field due to historical data entry challenges, entering this identifier allows for a more useful and accurate review of student experiences across campus. This is especially important for capturing undergraduate student research experiences.

**Callout 2:** Use up / down arrows to change order of people or red X to delete people

**Callout 3:** Use "Add Another Author" button to add more people. Selecting from People at W&M adds entry to that faculty member's record but only you, as primary author, can edit.



Entering dates appropriate to your publication type/status will ensure the entry is included only in correct annual reports. Undated records will appear on all reports regardless of date range selected.

Expected Date of Submission	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Submitted	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Accepted	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Published	<input type="text"/>	<input type="text"/>	<input type="text"/>
ISBN/ISSN Number/Case #	<input type="text"/>		
PubMed Central ID Number	<input type="text"/>		
DOI (Digital Object Identifier)	<input type="text"/>		
Audience of Circulation	<input type="text"/>		
Was this peer-reviewed/refereed?	<input type="text"/>		
Is this publicly available?	<input type="text"/>		
Abstract/Synopsis	<input type="text"/>		
Publication Information (will appear on Vita reports)	<input type="text"/>		
Miscellaneous Notes (will not appear on Vita reports)	<input type="text"/>		
Keywords (comma-delimited or newline-delimited)	<input type="text"/>		

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A date is a required data field for the Publications Tab entry; month and year for the applicable date field is most desirable, but one of these date data fields *must* have at least the year entered **in order for the entry to save.**

## Artistic and Professional Performances and Exhibits

This would include activities such as novels, poems, plays, paintings, and other works of a creative nature. Please include the original publication date, first performance date, or initial showing date.

## NSF Biographical Sketch

Faculty can use this report as a starting point for their NSF Biographical Sketch. Build the report by selecting data already in DMS. More than one report can be created using the Label field. Please note that in order to fully meet the NSF reporting requirements additional manual entries may be necessary. Currently only VIMS is using this report.

## Contracts, Grants, and Sponsored Research

Faculty can report all new monetary and in-kind awards received whether internal or external. It is especially important to list all those awards that occurred outside of the Office of Sponsored Programs; for example, a fellowship awarded directly to you or a sub-contract on an award administered by another institution.

## Publications

All scholarly works should be listed here including books or chapters written or edited, articles, reviews, commentaries and any other works based on your technical expertise. Also include textbooks, works intended for the public, and other similar publications with the original publication date. Please fill in all fields necessary for a standard citation (e.g. publisher, year, city, and state for books, journal, volume, year, and pages for a journal).



- **Import Items:** If your publications are already stored in another software system, you can import them from the following software systems: EndNote, Mendeley, RefWorks, Zotero, Google Scholar, Web of Science and Scopus. Clicking on BibTeX will open up documentation on this feature.

## < Publications

Import Items

+ Add New Item

Item

## Import Items

Cancel Import

Continue >

The citations of your publications may already be stored in another software system. Instead of rekeying those citations into this system, import records from [other software systems](#) such as a reference manager:

• EndNote • Mendeley • RefWorks • Zotero

or another database:

• Google Scholar • Web of Science • Scopus

From the other system, export your records into a [BibTeX](#) file.

> Select the file to upload.

Choose File...

No file selected

Click [BibTeX](#) to open other documentation.

**Import Items**

**OVERVIEW**

There is a good chance that citations of your publications are already stored in another software system such as a reference manager or database — for example, EndNote, Google Scholar, Mendeley, RefWorks, Scopus, Web of Science or Zotero. Those software systems enable you to pick records and then export them into a BibTeX file.

This feature enables you to upload that BibTeX file so that you do not need to rekey those citations. Below you will find details on how to export publication information from a few common software systems into a BibTeX file.

[What is BibTeX?](#)

[How to Export Publications to a BibTeX File](#)

**HOW TO USE THE FEATURE**

Publications must include the following required fields:

- **Contribution Type:** Select from the drop-down menu. If you choose Other, be sure to fill in the adjacent field, “Explanation of ‘Other’.”
- **Current Status:** Works in progress, submitted, etc. contributions can be entered here but *only papers that are “Accepted” or “Published” will show up in reports*. Be sure to keep this attribute current.
- **Title of Contribution:** Include title of: Articles, Chapters in Books, Books, Proceedings of Meetings, Paper presentations, etc. (Note that title of a larger work can be documented in a separate field). It is recommended that you do not italicize the title or place quotation marks around it (unless a direct quote is referenced within the title).
- **Authors/Editors:** Your name will display as 1<sup>st</sup> author by default. Once additional people are added, use up/down arrows to adjust order. Add as many author boxes as applicable using the “Add another Author” button. Multiple boxes can be added at once. The “Role” and “Student?” fields are required entry for each person. Your name will be populated as it is entered in the system however you can choose to provide a maiden or pen name as the screen shot on the next page illustrates.



## Authors/Editors

Please order the authors/editors in the order of authorship/mentorship.

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

### 1st Author/Editor

People at The College of William and Mary	First Name	Middle Name/Initial	Last Name
Test, Test T: cjmav	<input type="text"/>	<input type="text"/>	<input type="text"/>

Provide a maiden or pen name, if applicable

- **Dates:** Dates are critical. The absence of a date is interpreted by DMS as “any date.” A report for 2013-14 will include publications dated in 2013-14 plus any publications without date. Please enter as applicable date fields with month, day and year.
- **AACSB Classification (applicable to School of Business faculty):** Select from the drop-down menu.

While other fields are optional, faculty should enter as much information as possible to produce the most accurate and complete records; skipping only those fields that are not required and not applicable to your publication type. Edited Volumes screen is also in use by the School of Law.

## Intellectual Property

This would include all protected works not listed above. Examples would be inventions whether patented or not, trademarks, and copyrighted materials such as computer programs.

## Presentations

This would include all talks, posters, and other presentations made to an audience of your professional peers. (Presentations to other audiences would go under Service or Media Contributions.) Please include the date, location, and event. Presentations given on multiple occasions can be entered by “copying” the first entry then editing the data and location. If “Other” is selected as presentation type, please complete “Explanation of ‘Other’.” Location of presentation should be used to document city and state.

## Research Currently In Progress

This screen allows faculty to enter research that is under way in stages of planning, on-going or writing results.



## SERVICE

### General Service

The General Service screen allows faculty to document service in the department, school, college/university level, professional and public areas.

General Service must include the following required fields:

- **Service Type:** Category of service. If you choose Other, be sure to fill in the adjacent field, "Explanation of 'Other'."
- **Committee/Organization Name**
- **Position/Role:** Select from the drop-down menu. If you choose Other, be sure to fill in the adjacent field, "Explanation of 'Other'."

List all new service not noted above according to category. Edit any previous entries for any service that ended this year to include an end date. For on-going service, your previous entry will continue to appear if it contains no end date (no end date indicates "through present").

Service should be uncompensated or nominally compensated when included here. Paid service should be appropriately documented in the screen for Academic, Government, Military and Professional Positions.

While it is appropriate to include offices held with professional organizations, simple membership in such organizations should be documented under Professional Memberships screen.

**NOTE:** Options to document roles of editing exist here in General Service but also exist in Intellectual Contributions. Please review your options and enter into the screen that best reflects your activity, ensuring no duplication exists.



## REPORT GENERATION

Faculty have access to three custom reports – Vita, Presentations, Intellectual Contributions and NSF Biographical Sketch. The following steps allow for creation of any of these reports.

After logging into the DMS site, click on the left menu bar that reads “Run Reports.”

- Step 1      Select desired report from the drop-down list.
- Step 2      Select the date range. **Remember** – activities with no dates will always appear regardless of date range selected.
- Step 3      Select report citation style from drop down menu (APA, MLA, Chicago, Bluebook).
- Step 4      Select report format (Microsoft Word, Adobe PDF, or HTML). Downloading as Microsoft Word document facilitates editing of any empty field, deleting unwanted data or changing layout.  
**NOTE:** Any information that you type directly into the Microsoft Word document will NOT be saved in the Digital Measures system. You will need to save the Word document like a normal document and keep a copy for your records.

Under step 4, select “Letter” for your page size and then click on the “Run Report” box in the upper right of the screen.



- Step 5      Then click “Open” or “Save” from the File Download dialog box.

Some reports may have additional steps.

**NOTE:** Reports can also be generated using Rapid Reports found on left menu bar under Manage Data. Rapid Reports are useful to quickly determine how your input will appear on reports. Should faculty identify a need for an ad-hoc report or a new custom report, they should contact their school’s administrator for assistance.



## APPENDIX A - COMMON ACTIVITIES & ENTRY LOCATIONS

A list of common faculty activities and the corresponding entry locations in DMS are provided below. For most activities, the proper categorization should be self-explanatory, but any questions or comments about entry locations or requests for additional activity types should be directed to your school's administrator.

<b>Type of Activity You Need to Enter:</b>	<b>Screen to Select:</b>
Employment: <ul style="list-style-type: none"> <li>• Academic - Post-Secondary</li> <li>• Academic - P-12</li> <li>• Professional</li> <li>• Military</li> <li>• Government</li> </ul>	General Information - Position History
W&M administrative roles in college, school or department <ul style="list-style-type: none"> <li>• Area Coordinator</li> <li>• Dean (including Vice, Associate, Contact or Assistant)</li> <li>• Chair (including associate)</li> <li>• Director (including deputy)</li> </ul>	General Information - Position History
Professional development activities: <ul style="list-style-type: none"> <li>• Conference Attendance</li> <li>• Continuing Education Program</li> <li>• Faculty Internship/Fellowship</li> <li>• Self-Study Program</li> <li>• Seminar</li> <li>• Tutorial</li> <li>• Workshop</li> <li>• Other</li> </ul>	General Information - Faculty Development Activities Attended
Interviews, editorials, etc. that highlight your professional expertise <b>NOTE:</b> Activities such as a Poetry-Online Journal would appear to fit two screens. Where possible, use the appropriate Scholarship screen for entry. <ul style="list-style-type: none"> <li>• Internet (including blogs, online publications)</li> <li>• Magazine</li> <li>• Newspaper</li> <li>• Radio</li> <li>• TV</li> <li>• Other</li> </ul>	General Information - Media Contributions
Personal/One on One Instruction to students: <ul style="list-style-type: none"> <li>• Directed Individual/Independent Study</li> <li>• Dissertation Committee (Chair/Member)</li> <li>• Dissertation Defense Committee (Chair/Member)</li> <li>• Doctoral Advisory Committee (Chair/Member)</li> <li>• Internship Advisor</li> <li>• Master's Thesis Committee (Chair/Member)</li> <li>• Postdoctoral Research Supervision</li> <li>• Supervised Research/Teaching Activity</li> <li>• Undergraduate Honors Thesis</li> </ul>	Teaching - Directed Student Learning



<ul style="list-style-type: none"> <li>• Other</li> </ul>	
<p>Special activities (not for credit)</p> <ul style="list-style-type: none"> <li>• Certification</li> <li>• Continuing Education</li> <li>• Faculty Internship</li> <li>• Guest Lecture</li> <li>• Management/Executive Development</li> <li>• Review Course</li> <li>• Seminar</li> <li>• Workshop</li> <li>• Other</li> </ul>	<p>Teaching - Non-credit Instruction Taught</p>
<p>Activities in the Creative Arts</p> <ul style="list-style-type: none"> <li>• Art (Exhibition; Competitive, Exhibition, One-Person; Exhibition, Group; Exhibition, Invitational; Arts Festival; Art Works in Publication)</li> <li>• Dance (Choreograph piece; Choreograph multiple pieces; Perform piece; Perform multiple pieces; Interdisciplinary work(s); Create marketing/PR; Musical Score creation/preparation; Coaching; Adjudicating)</li> <li>• Drama (Print Journal; Online Journal; Anthology; Book or Collection of Plays)</li> <li>• Music Composition (Major Work, Publication; Major Work, Performance, Prof Ensemble; Major Work, Performance; Other Work, Publication; Other Work, Performance)</li> <li>• Music Conducting (Professional Ensemble, Regular; University or Other Ensemble, Regular; Regional, All-State, or Prof Ensemble; Non-Prof Ensemble, Regular; University or Other Ensemble)</li> <li>• Music Performance (Participation; Full Chamber Recital; Major Participant, Opera/Musical; Full Solo Recital; Major Participant Oratorio; Minor Participant, Opera/Musical; Accompanist/Church Organist; Partial Chamber Recital; Symphony Orchestra Member, Principal; Symphony Orchestra Member, Other; Free-lance)</li> <li>• Music (Adjudicator, Clinician, or Consultant)</li> <li>• Novel</li> <li>• Nonfiction (Print Journal; Online Journal; Anthology; Book)</li> <li>• Poetry (Print Journal; Online Journal; Anthology; Book)</li> <li>• Short Fiction (Print Journal; Online Journal; Anthology; Book)</li> <li>• Theatre (Direct play, Musical staging; Manage play; Design (all elements); Design scenery; Design lights; Design sound; Design costumes; Design special effects)</li> <li>• Theatre (Build scenery; Build costumes; Prepare special effects; Prepare sound (effects/equipment); Prepare lighting (hang/circuit/focus); Create marketing/PR; Perform; Write play; Compose play musical score; Tour coordination; Interdisciplinary work(s); Adjudicating)</li> <li>• Other</li> </ul>	<p>Scholarship/Research – Artistic and Professional Performances &amp; Exhibits</p>
<p>Publications</p>	



<ul style="list-style-type: none"><li>• Abstract</li><li>• Book (Review; Review – Law; Casebook – New; Casebook – Revised; Chapter in Non-Scholarly Book-New; Chapter in Non-Scholarly Book-Revised; Chapter in Scholarly Book-New; Chapter in Scholarly Book-Revised; Chapter in Textbook-New; Chapter in Textbook-Revised; Non-Scholarly-New; Non-Scholarly-Revised; Scholarly-New; Scholarly-Revised; Textbook-New; Textbook-Revised; Treatise – New; Treatise – Revised; Treatise - Supplement)</li><li>• Brief</li><li>• Broadcast Media</li><li>• Case Comment</li><li>• Cited Research</li><li>• Comment</li><li>• Comment, Supreme Court Case</li><li>• Commentary</li><li>• Conference Proceeding</li><li>• Dissertation</li><li>• Edited Volume</li><li>• Editorial</li><li>• Encyclopedia Entry</li><li>• Essay</li><li>• Essay Review</li><li>• Instructor's Manual</li><li>• Journal Article (Academic Journal; In-House Journal; Professional Journal; Public or Trade Journal)</li><li>• Law Review</li><li>• Law Review (Student Comment; Student Note; Symposium Note; Symposium Issue)</li><li>• Legislation</li><li>• Magazine/Trade Publication</li><li>• Manuscript</li><li>• Material Regarding New Courses/Curricula</li><li>• Monograph</li><li>• Newsletter</li><li>• Newspaper</li><li>• Note</li><li>• Op-Ed</li><li>• Regular Column in Journal or Newspaper</li><li>• Reply</li><li>• Report</li><li>• Research Report</li><li>• Review</li><li>• Review Essay</li><li>• Software</li><li>• Software, Instructional</li><li>• Symposium Issue</li><li>• Study Guide</li></ul>	<p>Scholarship/Research – Publications</p>
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<ul style="list-style-type: none"> <li>• Technical Report</li> <li>• Translation or Transcription</li> <li>• Working Paper</li> <li>• Written Case with Instructional Material</li> <li>• Other</li> </ul>	
<p>Obtaining patent or copyright</p>	<p>Intellectual Property</p>
<p>Conference or meeting presentations including demonstration, exhibit, Keynote/Plenary Address, Lecture, Oral Presentation, Panel, Paper, Poster, Reading of Creative Work/Performance, Roundtable, Seminar, Session, Symposium, Workshop, Other</p> <p>Where faculty role included:</p> <ul style="list-style-type: none"> <li>• Author Only</li> <li>• Chair</li> <li>• Co-Chair</li> <li>• Coordinator/Organizer</li> <li>• Discussant</li> <li>• Leader</li> <li>• Moderator</li> <li>• Panelist</li> <li>• Presenter &amp; Author</li> <li>• Presenter Only</li> <li>• Other</li> </ul>	<p>Presentations</p>
<p>Document service activities (advisory service, department, school, college, professional, public, non-profit or other)</p> <ul style="list-style-type: none"> <li>• Attendee, Award Ceremony; Convocation; Graduation; Meeting; Orientation</li> <li>• Board Member</li> <li>• Board of Advisors of a Company</li> <li>• Board of Directors of a Company</li> <li>• Chairperson</li> <li>• Committee Chair</li> <li>• Committee Member</li> <li>• Conference-Related</li> <li>• Editor, Associate Editor; Book; Conference Proceedings; Journal Editor; Senior Editor; Textbook;</li> <li>• Editorial Review Board Member</li> <li>• Faculty Advisor</li> <li>• Faculty Advisor – Pre–major Advising</li> <li>• Faculty Liaison</li> <li>• Faculty Mentor</li> <li>• Fellow</li> <li>• Grant Proposal Reviewer, Internal/External</li> <li>• Interaction with Industry</li> <li>• Officer, Other Officer; President/Elect/Past; Secretary; Treasurer; Vice President</li> <li>• Panelist</li> <li>• Prepare/Grade Certification Exams</li> <li>• Program Coordinator; Organizer</li> </ul>	<p>General Service</p>



<ul style="list-style-type: none"><li>• Reviewer, Ad Hoc Reviewer; Book; Conference Paper; Grant Proposal; Journal Article; Textbook</li><li>• Session Chair</li><li>• Special Institutional Assignment</li><li>• Student Org Advisor (Non-Professional Org; Professional Org)</li><li>• Student Recruiter</li><li>• Student Placement</li><li>• Task Force Chair/Member</li><li>• Track Organizer</li><li>• University Senate Service</li><li>• Workshop Organizer</li><li>• Other</li></ul>	
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## APPENDIX B – DMS READ ONLY DATA FIELDS

Several fields in DMS are Read Only as these data are from another source on campus and avoids re-keying data already collected. Data in the source system must be correct before changing DMS. Additionally, we may have data that has been verified for use in reporting or compliance, such as degrees awarded, and therefore these fields cannot be changed without the proper documentation on file in the Dean's Office.

The table below outlines the DMS screens and data fields and how to proceed with changes as the need arises.

Screen	Data Field	Source	Change Process
PCI	<ul style="list-style-type: none"> <li>Prefix</li> <li>First Name</li> <li>Preferred First Name</li> <li>Middle Name</li> <li>Last Name</li> <li>Suffix</li> <li>W&amp;M Email Address</li> <li>Building Where Your Office is Located</li> <li>Gender</li> <li>Race/Ethnicity</li> <li>Citizenship</li> </ul>	Banner HR System	Follow department/program standard operating procedures with regards to personnel changes in Banner HR.
Permanent Data	<ul style="list-style-type: none"> <li>Start Date</li> </ul>	Banner HR System	Follow department/program standard operating procedures with regards to personnel changes in Banner HR.
Yearly Data	<ul style="list-style-type: none"> <li>Academic Year</li> <li>College</li> <li>Department</li> <li>Sub-Department</li> <li>Banner HR Record</li> </ul>	These fields are created at the time your DMS user account is created and updated as needed.	Contact your school's DMS administrator.
Yearly Data	<ul style="list-style-type: none"> <li>Classification</li> <li>Faculty/Staff Rank</li> </ul>	Calculated field based on Banner HR system data	Contact your school's DMS administrator.
Yearly Data	<ul style="list-style-type: none"> <li>Fall Status</li> <li>Spring Status</li> <li>Summer Status</li> <li>Full-Time Equivalency</li> <li>Tenure Status</li> </ul>	Banner HR System	Follow department/program standard operating procedures with regards to personnel changes in Banner HR.
Education	All fields are read only.	College Administrator	Contact your school's DMS administrator.
Scheduled Teaching (Banner Imports)	All fields are read only (except course preparation fields at bottom of screen)	Banner Student	Follow the department/program standard operating policies for processing changes to the registrar's office. <b>Exception:</b> If Banner is correct but you need to delete a course then the department/program administrative staff can assist with this change. For example, Dr. Smith is the instructor of record on study abroad but is not teaching/leading this course.