Academic Profile (AP) User Guide — Introduction

Data Entry in the New Faculty Success Experience

Academic Profile (AP) is Michigan State University's system for collecting, managing, and reporting faculty and academic staff activity — teaching, research and creative work, and service — for annual review, reappointment, promotion, and tenure. AP is Watermark Faculty Success (formerly Digital Measures).

Help & Support:

Log in at academicprofile.msu.edu

AcadProf@msu.edu

517-353-0100

1. What's changed at a glance

Your data has not changed, and what you enter has not changed. What *has* changed is where your work lives and how you add and export it. You now start on a Home "Home" page, and your records live in "My Profile" My Profile which reads like a document — much like a CV — instead of a database of links and tables.

Before	Now (New Interface)
Activities home page	Home page, with your records in My Profile
Top navigation (Activities | Manage Data | Reports | Tools)	Side navigation (Home | My Profile | Reports | Settings)
Summary Screen (table of records for a screen)	Records listed in categories in My Profile
ADD NEW "ADD NEW" record button	ADD ACTIVITY "ADD ACTIVITY" button
Rapid Reports	EXPORT "EXPORT" dropdown on My Profile + Reports (custom reports retained)
Fixed section names and order	New: CUSTOMIZE DISPLAY — rename sections and reorder screens
—	New: CREATE OR CONNECT YOUR ORCID ID button in the profile banner

Managed data: *The new experience is for faculty and academic staff tracking their own activities. Administrative users will continue to manage data the same way they do now.*

1. Go to academicprofile.msu.edu. A login link to the system is on that page.

2. Log in with your MSU NetID and password. Both are **required** to access AP.

3. Once you are logged in, you land on Home headed "Welcome" with your name. See Section 3A.

3. Home and My Profile at a Glance

Two pages do most of the work in the new experience. Home is where you land and where items waiting for your review appear. My Profile is where your records live. Use the side navigation, on the left of every page, to move between Home, My Profile, Reports, and Settings. It replaces the tabs across the top of the old interface.

3A. Home at a Glance

Home is headed "Welcome" with your name. It shows your Tasks & To-Dos, the ADD ACTIVITY button, and a Tools & Services panel.

- **Side Navigation:** Use the navigation on the left to move between Home, My Profile, Reports, and Settings. Your avatar and name appear at the top of the side navigation.
- ADD ACTIVITY: Found in the top right of the welcome banner, starts a new record. See Section 4.
- **Help and Account Icons:** Th icon at the top right is Help. The person icon next to it is your account.
- **Tools & Services:** The panel on the right contains a Faculty Success Guide link.

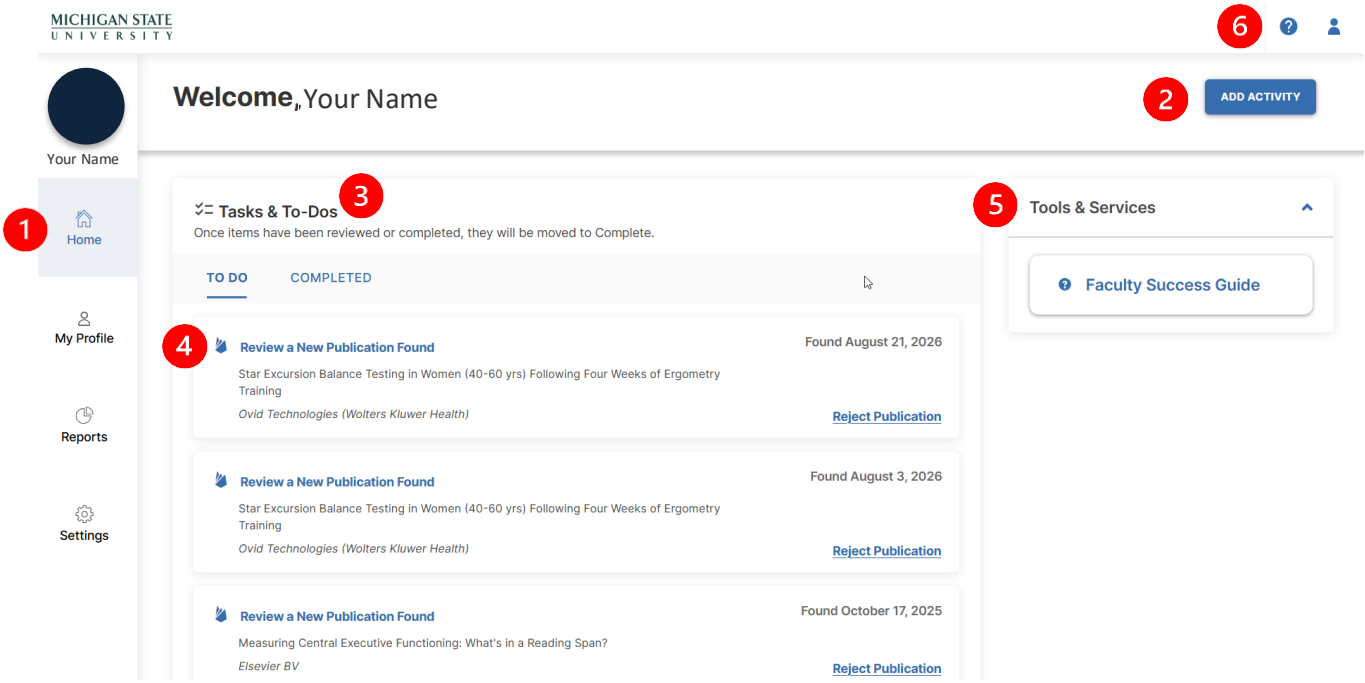


Figure: Home screen in the new experience.

1. **Side Navigation:** On the left, below your avatar and name — Home, My Profile, Reports, and Settings.
2. ADD ACTIVITY Blue button at the top right, to start a new record.
3. **Tasks & To-Dos:** Items waiting for your review are under the "TO DO" tab; reviewed or completed items move to the "COMPLETED" tab.
4. **Review a New Publication Found:** A publication suggestion card in Tasks & To-Dos — open the card to review it or choose Reject Publication on the card.
5. **Tools & Services:** Panel on the right, containing the Faculty Success Guide link.
6. **Help and account icons:** At the top right of the page.

Publication Suggestions in Tasks & To-Dos

Publication suggestions appear on Home, in Tasks & To-Dos. When a proactive search finds a publication that may be yours, it appears under the "TO DO" tab as a "Review a New Publication Found" card, showing the publication title, the date it was found, and the source.

For each suggestion you can:

- Open the card to review it, edit it if needed, then add it to your profile; or
- Choose Reject Publication on the card, if it is not yours.

Once an item has been reviewed or completed, it moves to the "COMPLETED" tab. If a suggestion will duplicate a record you already have, open it to compare the two side by side and merge them, rather than keeping both.

3B. My Profile at a Glance

Select My Profile in the side navigation to see and enter your records. My Profile is the document-style view that replaces the old Activities home page and Summary Screens.

- **Profile Banner:** The banner at the top of My Profile shows your name and Michigan State University, next to your avatar.
- **Search:** Search allows you to search ALL records in your Academic Profile account. Use Search and SEARCH button on My Profile. Click "Search Tips" for tips on how to find specific records.

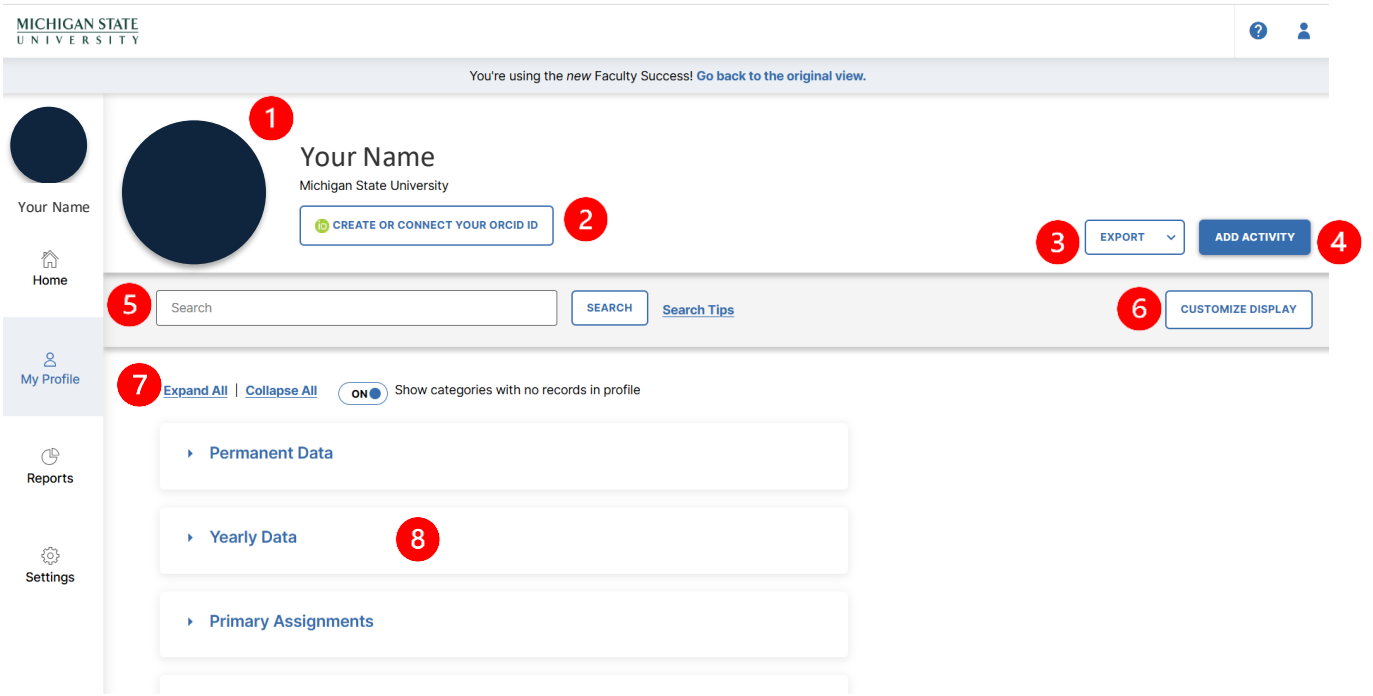


Figure: My Profile view in the new experience

1. **Profile Banner:** shows your name and Michigan State University, next to your avatar.
2. CREATE OR CONNECT YOUR ORCID ID button in the profile banner, to create or connect your ORCID iD.
3. EXPORT dropdown button on the right of the profile banner, to export your CV. See Section 9.
4. ADD ACTIVITY blue button next to EXPORT, to start a new record.
5. Search SEARCH Search Tips link below the banner.
6. CUSTOMIZE DISPLAY button on the right, to personalize how your profile is displayed. See Section 10.
7. **Expand All | Collapse All:** links above the categories, with the "ON Show categories with no records in profile" toggle next to them.
8. **Categories:** collapsible cards listing your records, beginning with Permanent Data, Yearly Data, and Primary Assignments.

Your Categories

My Profile is divided into collapsible categories. Open a category, then a screen within it, to see and enter records for that kind of activity. The first categories are Permanent Data, Yearly Data, and Primary Assignments, with more categories below them.

Use **Expand All** to open every category at once, or **Collapse All** to close them. The "ON Show categories with no records in profile" toggle controls whether categories that contain no records are shown.

**How your categories are labeled and displayed may differ from the screenshot above if you have customized your display — see Section 10, Personalizing My Profile.

4. Adding a Record with Add Activity

ADD ACTIVITY is the fastest way to add a single new record.

1. Select ADD ACTIVITY. The button is at the top right in Home and in My Profile.
2. Choose the activity/screen for the record you want to add. ADD ACTIVITY opens with a short list of your top screens — the categories you create records for most.

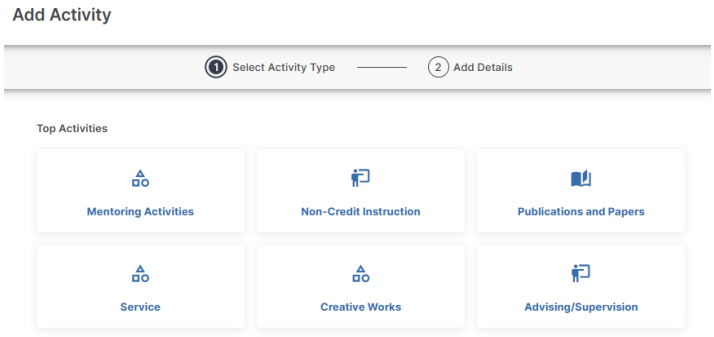


Figure: Add Activity menu, showing your Top Activities

3. If the screen you need is not in that short list, open the category and screen from My Profile instead, and add the record there.
4. Complete as many fields as possible. See Section 8 for the guidance text on each screen, Functional Area, and date rules.
5. Add the dates. Dates **must** be added to save any record, then save the record.

5. Working with Records in a Category

Open a category in My Profile to see the records already entered on each screen.

- **Edit a Record:** Click the category heading, navigate to your desired record, open the record, make your changes, and save.
- **Delete a Record:** Select the records check box ☐ and click DELETE to delete it.
  Warning: *Once a record is deleted, there is **no** way to recover that record. A new record must be added if a deletion occurs by mistake.*
- **Shared Records:** Records entered by another colleague at Michigan State University are shared records. You can open the record and modify it if necessary. If the entry needs to be deleted, contact the colleague who is the record owner, or the Academic Profile (AP) office. See also Section 7.
- To find a specific record, use Search... SEARCH Search Tips Click Search Tips for tips on improving your search results.

Importing Publications

To import records in bulk, use the IMPORT option on the Publications and Papers screen. This opens the ability to import BibTeX files, or to import from a third party such as Scopus, Web of Science, Crossref, ORCID or PubMed.

***Note:** The import function is only available on the Publications and Papers screen.*

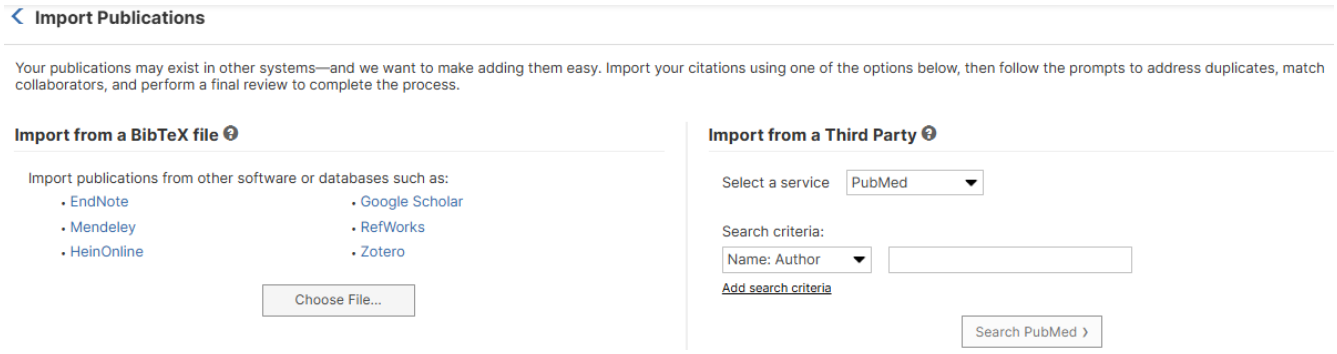


Figure: Import options for Publications and Papers

6. Editable vs. Locked Records

AP contains system-of-record data that has been auto-loaded into several screens. These records are locked and cannot be deleted. The following screens are populated by system-of-record data:

Auto-Loaded Screens		
Permanent Data	Yearly Data	Primary Assignments
Additional Assignments	Salary	Personal and Contact Information
Education	Graduate Committees	Credit Courses at MSU
Sponsored Programs – Administered by MSU SPA	Patents at MSU	

Some system-of-record screens have fields that can manually populated; but fields pre-populated by the system-of-record data **cannot** be edited. A message appears at the top of screens that contain system-of-record data.

- **Gray Background:** Fields with a gray background are locked and **cannot** be edited. They typically appear with a lock icon. These fields contain system-of-record data. Corrections and updates must be made in the source system.
- **White Background:** Fields with a white background can be populated and updated.



Figure: Example of fields able to be populated or updated

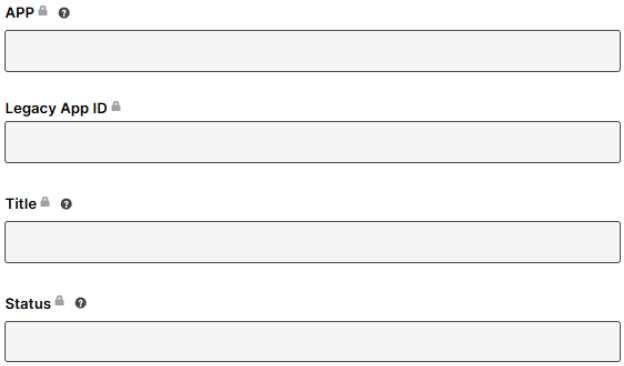


Figure: Example of locked fields that cannot be populated or updated

Exception: MSU Internal Awards and Other Funding

The MSU Internal Awards and Other Funding screen is a *partially* auto-loaded screen, with internal grant proposals that were submitted using the eTransmittal system. Sponsored Programs Administration (SPA) does not maintain award data for these proposals, so the AP screen fields are opened and can be edited by Faculty and Academic Staff (FAS) to update and complete their proposal records. The only fields that **cannot** be manually edited in MSU Internal Awards and Other Funding are the "APP #" field and the "Legacy App ID" field.

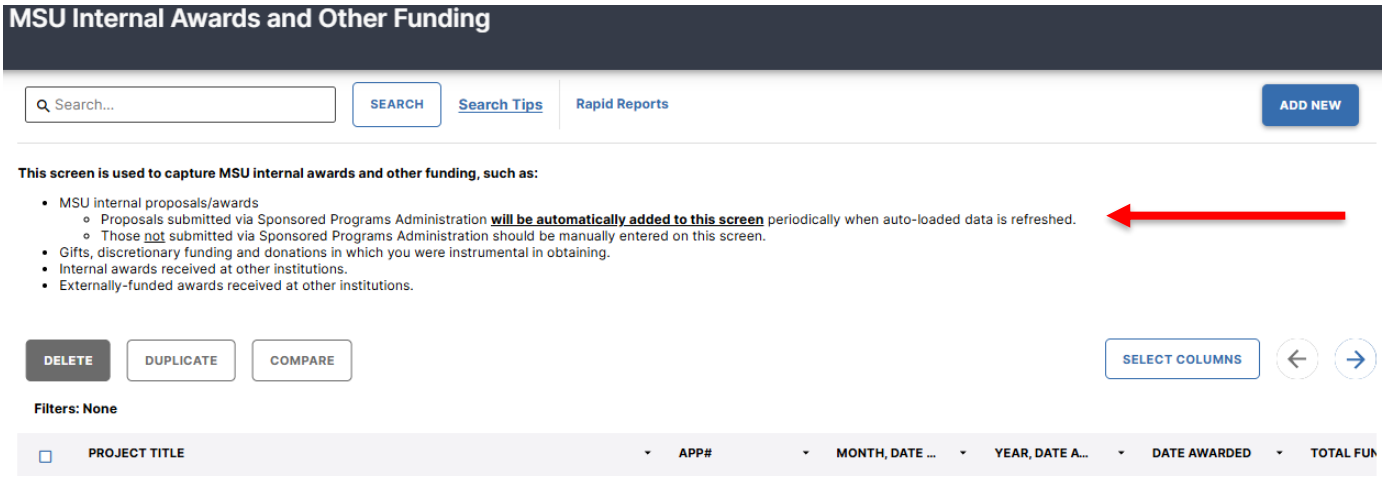


Figure: MSU Internal Awards and Other Funding screen

7. Collaborators and Linked Records (Dynamic Sub Answers)

Dynamic Sub Answers (DSAs) allow multiple sub-records to be entered for one main record. For example: On the Publications and Papers screen, the main part of the screen holds the details of the publication, and the DSA lets you enter as many authors or editors as the publication has.

Linking (Sharing) a Record with Other FAS at MSU

Some screens have been designed with DSAs that include a dropdown of other Faculty and Academic Staff (FAS) at MSU. That means records in Publications, Presentations, Internal Awards and Other Funding, Intellectual Property, Exhibits and Performances, Creative Works, etc. can be entered one time for all authors at MSU to share.

All FAS linked to a record have the ability to edit the record; but only the record owner can remove a linked author. AP staff also have the ability to remove linked authors, and can assist users when shared records need to be adjusted.

*The only exception is the Goals, Reflection, and Impact Narratives screen. Records on this screen containing multiple MSU partners will not be linked to the selected FAS.

Name Fields on a Linked Record

The "First Name", "Middle Name/Initial", and "Last Name or Full Organization Name" fields are used to enter a maiden name, pen name, or the name of authors not at MSU (or who do not have an AP account). If a record is linked to a FAS at MSU, these fields will auto-populate; the names entered in these fields can be modified. The names displayed will override the name in the dropdown menu for reporting. This allows the record to be linked while displaying the accurate author names in a citation.

Adding and Arranging Collaborators

- ⊕ **Add Another Author:** To add more authors, editors, presenters, collaborators, etc., use the Add "Another Author" (editor, presenter, collaborator etc.) button.
- ⋮ **Row menu:** To add an author above or below a specified row, use the row menu. From there you can also move a row to a desired position, or delete a row.

8. Adding an Item: Fields, Functional Area, and Dates

You are encouraged to complete **as many** fields as possible that relate to the entry being added. Dates **must be** added to save any record.

- **Screen Guidance Text:** Each screen gives a quick summary of what should, or should not, be entered within that screen. Please read it before you start the record.

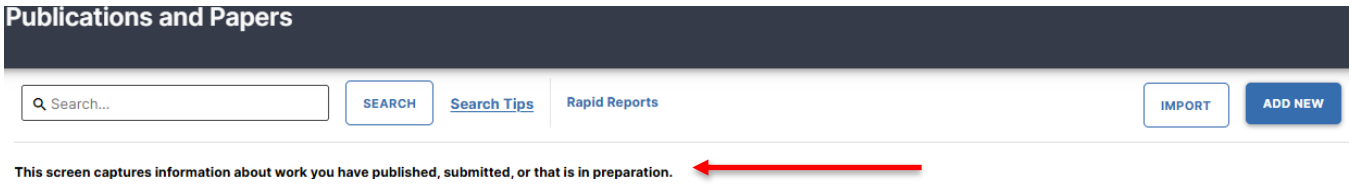


Figure: Screen guidance text

- **Functional Area:** Several AP screens have a 

field. This asks for the primary focus of the accomplishment (publication, presentation, exhibits and performances, awards, etc.). This classification is used for reporting purposes and is **very important**.

Dates

You can capture your publication dates from Date Effort Began through to it being Published. Instead of entering each status update individually, you can update your publication in one single record.

Other screens — Presentations and Guest Lectures, Reviews of My Work, Media Appearances and References to My Work, etc. — have single dates to capture when the contribution took place.

Screens with a set of dates — Service, Exhibits and Performances, Mentoring Activities, etc. — have start and end date fields. This allows you to capture activities that are ongoing, or that took place over a period of time.

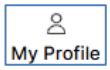
Situation	Start Date	End Date
Occurred on a specific day	Leave blank	Enter the **date it occurred**
Ongoing, or not yet completed	Enter the **Start Date**	Leave blank
Has a specific duration	Enter the **Start Date**	Enter the **End Date**

Dates **must be added to save any record.

9. Running a Report / Exporting your CV

Reports are built from the data you have entered within the date range you select. Keeping your records current and complete, including Functional Area and dates, is what makes a report accurate.

1. To export your CV, use the 

dropdown on 

. To generate a report, open 

from the left side navigation.
2. On the 

page, (make sure the **REPORTS** tab is selected at the top of the page) — the **INSIGHTS** tab sits next to it. Select the name of the report you would like to view or edit, in the report list.
3. To create a new report instead, select 

at the top right of the 

page. (Custom reports are retained in the new experience, so report templates built for your college or department will continue to be available.)

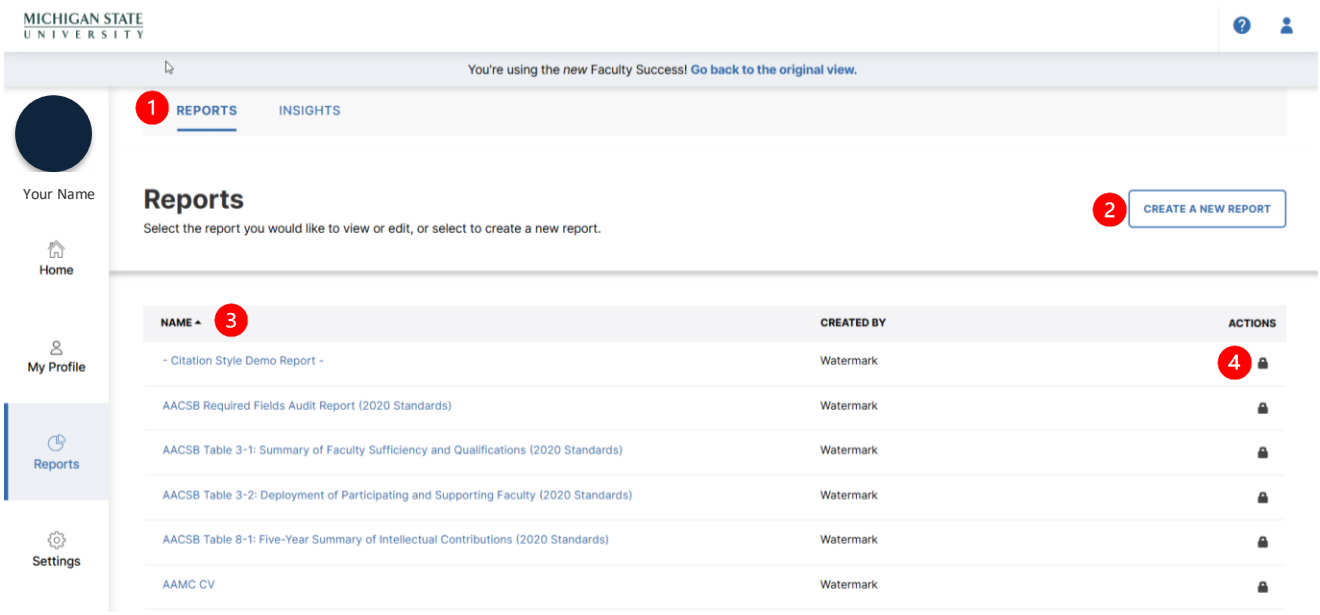


Figure: Reports in the new experience

1. **REPORTS and INSIGHTS Tabs:** At the top of the page. Reports are on the **REPORTS** tab.
2. CREATE A NEW REPORT **:** Button at the top right, to create a *new* report.
3. **Report List:** A table with the columns "Name", "Created By", and "Actions". Select a report name to view or edit that report.
4. **Lock Icon and Actions:** Reports created by Watermark, such as the AAMC CV, show a 🔒 icon in the "Actions" column — they are templates and are locked. A report template *you* created shows a ▼ in the "Actions" column for the actions you can take on a report template *you* have created.

Reports include, for example: CV / Vita, Faculty & Academic Staff Annual Review Template, Form on Progress and Excellence in Reappointment, Promotion or Tenure Action (formerly known as Form-D), and various department reports etc.

When you run a report, set the date range for the report and choose your file format (Microsoft Word (.doc), PDF, Webpage (.html)).

10. Personalizing My Profile (New)

My Profile is yours to arrange. Start from the CUSTOMIZE DISPLAY button on My Profile, located to the right of the Search field row Search... SEARCH Search Tips. Personalizing only changes how the categories in My Profile are labeled and displayed. It does **not** change the data in your records or what is available for reporting.

- **Rename a Section:** Rename a section to the wording you use — for example, renaming "Intellectual Contributions" to "Publications". You can do this by clicking the ✎ next to the category you wish to edit, type in your desired custom label text and click ✓ to accept the change or ⊘ to reject your changes.
- **Reorder Screens:** Reorder screens so the screens you use most come first. To do this, click, hold and drag the ⠿ icon next to the category name (up or down) to the desired position.
- **Change a Record Display Style:** Change how records in select categories (such as publications) are displayed. To do this, click in the Citation Style* drop down menu and choose the desired display style.

11. Getting Help

On 

, the Tools & Services panel (on the right) contains a Faculty Success Guide link, and the icon at the top right of the page is "Help". The "Help & Support" item from the dropdown menu takes you to Academic Profile Instructions and Support web page which includes Quick Guides, Training Videos, Security, FAQ, and Contact Information.

For help with a record — including a shared record that needs to be adjusted, or a linked author who needs to be removed — contact the Academic Profile office:

Email: AcadProf@msu.edu

Phone: 517-353-0100

Web: academicprofile.msu.edu