



Quick Guide – Import Data from a CV

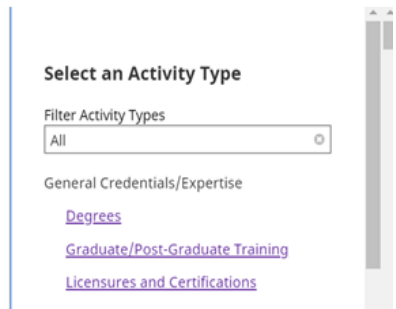
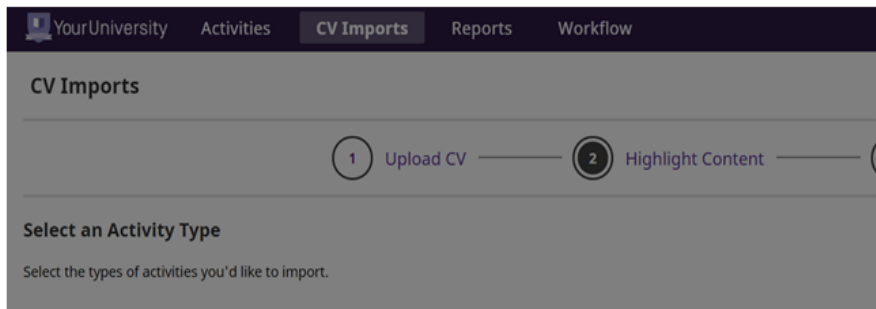
<https://www.digitalmeasures.com/activity-insight/docs/guide.html>

The CV Importer feature in Watermark Faculty Success will help you get data into the system quickly and accurately using the source you most trust—your CV! We know you are busy and the goal of CV Imports is to allow you to spend less time entering data and more time with your Teaching, Service and Research activities.

The capability uses highlighting technology to identify areas of your CV that tie to specific fields within Faculty Success, customized to our system configuration. Once the highlighting is complete, you go through a series of steps to review, validate and confirm the upload.

Access CV Imports in the top Navigation bar. Upload your CV in a compatible format (.doc, .docx, .odt, .rtf). Previous uploads will appear as a Draft in Progress with a link to the uploaded file.

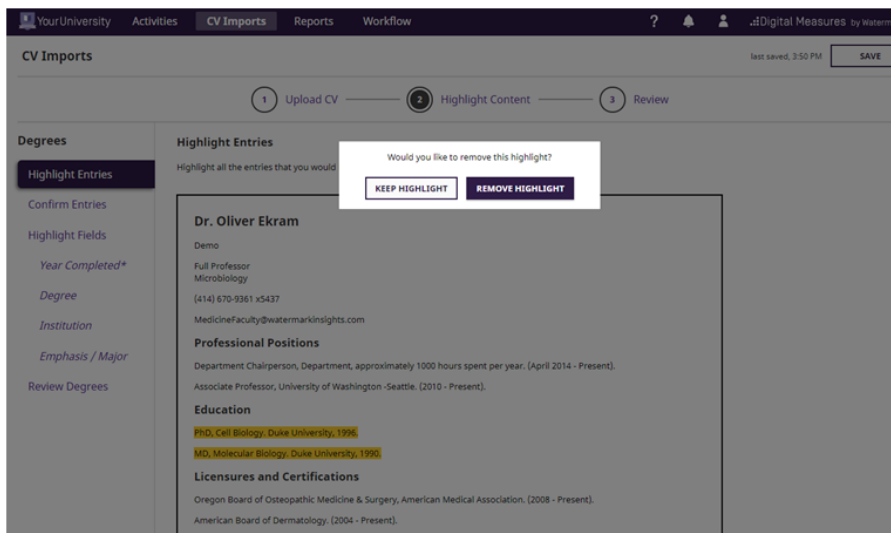
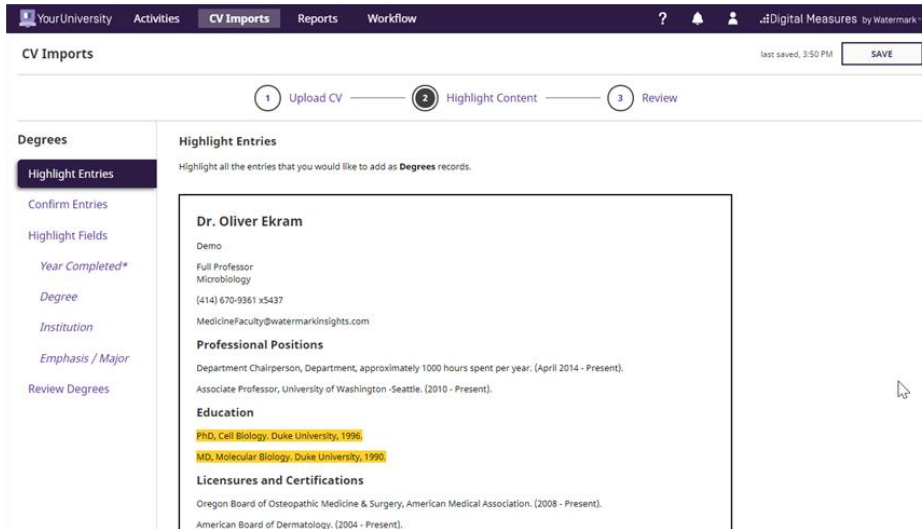
After selecting “Begin” at the bottom of the screen, you will have the option of selecting specific sections of your uploaded CV to import into the database. A side bar will appear that includes the data collection screens available for importing data.



Use the “Filter Activity Types” field to filter activity types that have been completed, started, or not started.

After selecting the Activity Type, you will be asked to complete the following actions:

Highlight Entries: Highlight all records that match the selected Activity Type as they appear within your CV. Multiple records can be highlighted, and by clicking on a highlighted entry, you have the option to keep or remove that record from the import.



Confirm Entries: After highlighting all relevant activities, you will then have the opportunity to verify the records selected in Highlight Entries. Each of the highlighted records will appear as a separate entry for review. Records that appear to be parsed incorrectly can be merged or split through the “Merge or Split Entries” button. To merge or split these records, highlight the record to match the desired layout and press “Next” once this has been completed.

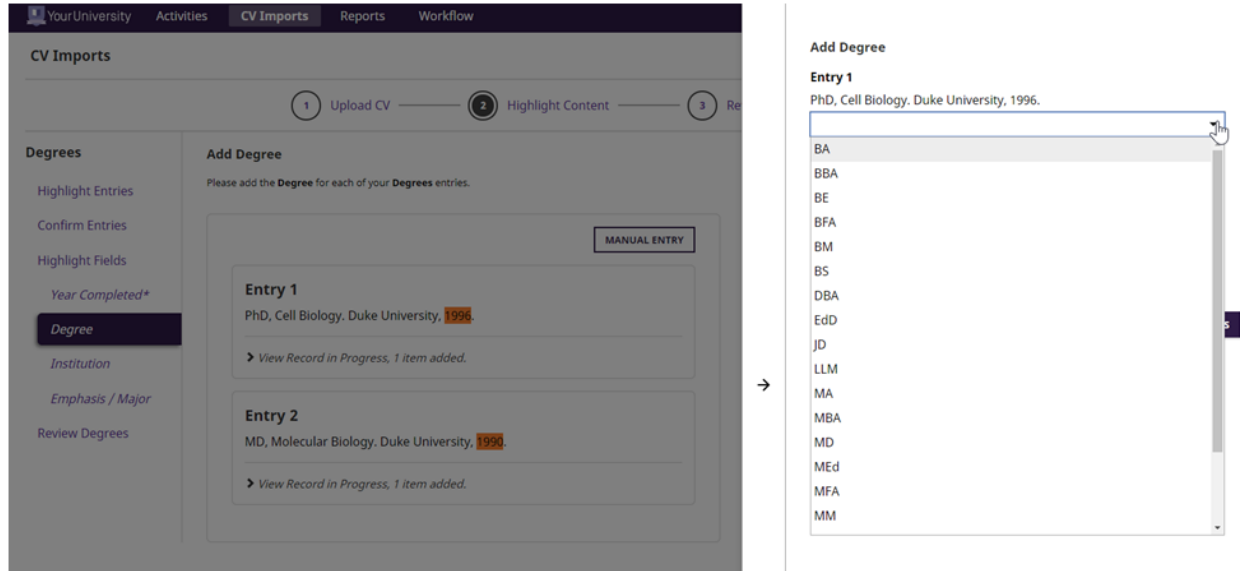
The screenshot shows the 'CV Imports' interface. At the top, there is a navigation bar with 'YourUniversity', 'Activities', 'CV Imports', 'Reports', and 'Workflow'. Below this, a progress indicator shows three steps: '1 Upload CV', '2 Highlight Content', and '3 Review'. The 'Confirm Entries' step is active. On the left, a sidebar lists 'Degrees' with sub-items: 'Highlight Entries', 'Confirm Entries' (selected), 'Highlight Fields', 'Year Completed*', 'Degree', 'Institution', 'Emphasis / Major', and 'Review Degrees'. The main content area is titled 'Confirm Entries' and contains a message: 'We've rendered your selection into individual entries. If any of these entries appear incorrect, press the "Merge or Split Entries" button. If everything looks good then move on to the next section.' Below the message is a 'MERGE OR SPLIT ENTRIES' button. Two entries are listed: 'Entry 1' (PHD, Cell Biology, Duke University, 1996) and 'Entry 2' (MD, Molecular Biology, Duke University, 1990). At the bottom, there is a '← BACK' button and a 'NEXT' button. A message above the 'NEXT' button says: 'Once you've confirmed that your entries are correct, move on to the next step.'

Highlight Fields: Now that activities from the uploaded CV have been identified, you can associate required and recommended fields within Faculty Success to the highlighted entries. Required and recommended fields are determined by your institution administrator.

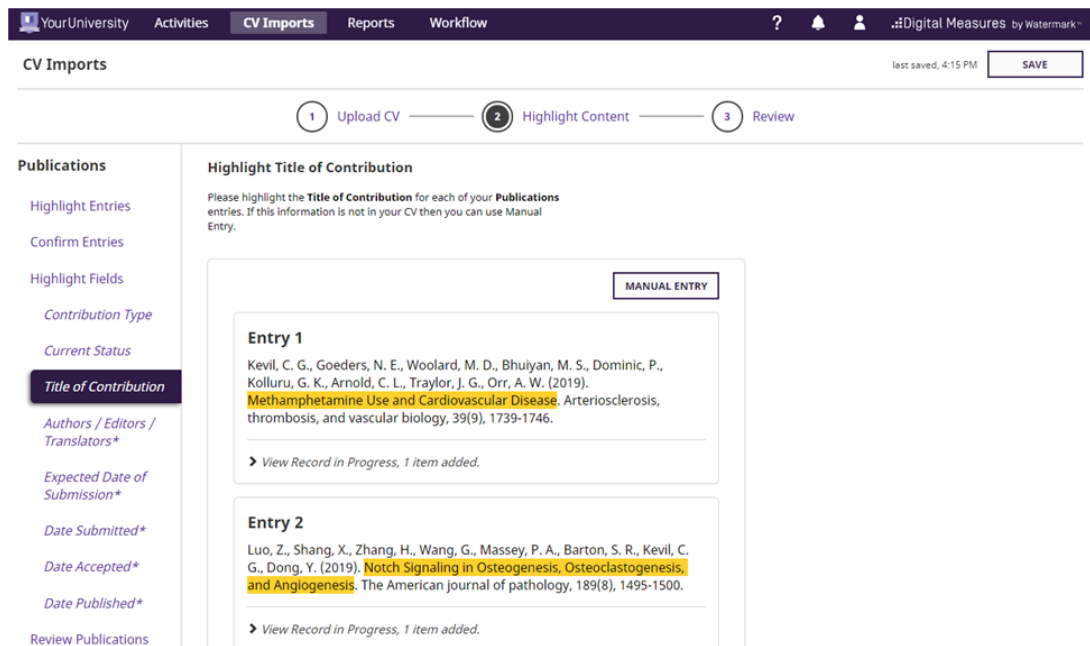
The screenshot shows the 'CV Imports' interface. At the top, there is a navigation bar with 'YourUniversity', 'Activities', 'CV Imports', 'Reports', and 'Workflow'. Below this, a progress indicator shows three steps: '1 Upload CV', '2 Highlight Content', and '3 Review'. The 'Highlight Fields' step is active. On the left, a sidebar lists 'Degrees' with sub-items: 'Highlight Entries', 'Confirm Entries', 'Highlight Fields' (selected), 'Year Completed*', 'Degree', 'Institution', 'Emphasis / Major', and 'Review Degrees'. The main content area is titled 'Highlight Fields' and contains a message: 'This page outlines the fields you'll be asked to provide information for. You only need to complete required fields and at least one date field for each entry, but completing recommended and optional fields will best ensure that your records are as comprehensive as possible. All required fields will end with an *.' Below the message, there are two sections: 'Recommended Fields' (Degree, Institution, Emphasis / Major) and 'Date Fields' (Year Completed).

After selecting one of the required or recommended fields, you will be prompted to classify the record according to the nature of the field.

For fields with drop down list values, a drawer will appear in the right half of your screen. From here you can select the appropriate value for each entry.



For text fields, such as the title of a Publication, you can highlight the relevant portion of your CV entry.



Any data needed for a field in Faculty Success that does not exist in your CV can be manually entered by using the “Manual Entry” button.

If you need to move to a different Activity type before finishing the review process of their current Activity Type, you can access the drawer menu by clicking on "Highlight Content" within the step indicator.

Review Records: After highlighting all of the necessary fields for each activity, you will have the opportunity to review and edit each entry before importing.

The screenshot shows the 'Review Publications' interface. At the top, there's a navigation bar with 'YourUniversity', 'Activities', 'CV Imports', 'Reports', and 'Workflow'. Below this, a progress indicator shows three steps: '1 Upload CV', '2 Highlight Content' (which is active), and '3 Review'. The main content area is titled 'Review Publications' and includes a 'SAVE' button. A sidebar on the left lists various activity types like 'Highlight Entries', 'Confirm Entries', 'Highlight Fields', 'Contribution Type', 'Current Status', 'Title of Contribution', 'Authors / Editors / Translators*', 'Expected Date of Submission*', 'Date Submitted*', 'Date Accepted*', and 'Date Published*'. The 'Review Publications' button is highlighted in the sidebar. The main area displays '4 Records to be Imported' and shows a detailed view for 'Record 1'. This view includes fields for 'Contribution Type', 'Current Status', 'Title of Contribution', 'Authors/Editors/Translators', and 'Expected Date of Submission'. A table lists authors with columns for 'People at Test University', 'First Name', and 'Middle Name/Initial'. At the bottom, there are 'BACK' and 'NEXT' buttons.

After confirming the accuracy of your entries, the Activity Type sidebar will appear and allow you to continue the parsing process for other activities, or to proceed to the final review before importing.

This screenshot shows the 'Select an Activity Type' sidebar. The main interface is dimmed, showing the 'CV Imports' header and the progress indicator with '2 Highlight Content' active. The sidebar is titled 'Select an Activity Type' and contains a search box for 'Filter Activity Types' with 'All' entered. Below the search box, there are several categories of activity types with links: 'General Credentials/Expertise' (Degrees, Graduate/Post-Graduate Training, Licensures and Certifications, Awards and Honors, Media Appearances and Interviews, Faculty Development Activities Attended), 'Career Information' (Professional Positions, Administrative Assignments, Consulting, Professional Memberships), and 'Teaching/Mentoring'. At the bottom of the sidebar, there is a 'REVIEW AND IMPORT 2 RECORDS' button. An arrow points from the sidebar to the main content area, which shows a preview of an activity record for Kenneth Leopold, including his title, department, and a list of publications.

Import Records: The final review screen will show all of the records to be imported alongside the required and recommended fields associated with such records. Once you have confirmed the accuracy of all records, click “Import” in the lower right-hand corner of your screen.

CV Imports last saved, 8:34 PM [SAVE](#)

1 Upload CV — 2 Highlight Content — 3 **Review**

Review

Please review all of the records you've prepared before importing to **Activities**. If there are any errors please, edit them and update before submitting.

2 Records to be Imported

▼ Publications: 2 Records

Record 1				EDIT
Contribution Type Book Chapter	Explanation of "Other" <i>Skipped</i>	Current Status Submitted	Title of Contribution The effect of ortho-fluorination on intermolecular interactions of pyridine: Microwave spectrum and structure of the CO ₂ -2,6-difluoropyridine weakly bound complex.	

[BACK](#) Once you've reviewed your new records and confirmed that everything is correct, import them into Activities. [IMPORT](#)