OVERVIEW: Manage Data

When you first visit the **PCATS** activities dashboard, it would be good to spend a few minutes looking through the screen topics that are accessible from it. To access a screen topic in any category, click on the topic name. The resulting summary screen displays topic specific records that have been input and stored in your activity data.

Upon selecting a topic from the PCATS activities dashboard, there are multiple actions available from which you may select, although, not all of the following actions are available in every screen:

ACTIONS:

- To **add a new record**, select the [+ Add New Item] button.
- To **import items in bulk**, select the [↟ Import Items] button (available only for the Intellectual Contributions screen).
- To **delete a record**, select the appropriate check box, then select the [🗑] button.
- To **edit** or **view a record**, click anywhere in the record row on the summary screen.
  Note: *Your Digital Measures Administrator may have added records to the system for you. These records can be viewed, but cannot be edited or deleted. A [🔒] icon identifies records that may not be deleted. If revisions are needed to the records which have been entered on your behalf, contact your Digital Measures Administrator using the* **Help** [?] *link in the bar menu across the top of your screen.*
- To **copy a record**, select the appropriate check box, then select the [⧉ Duplicate] button.

Saving Records

When working in the system, it is important that you preserve modifications by selecting one of the Save buttons at the top of the screen. If you attempt to navigate away from a screen containing unsaved changes, a warning message will display to determine whether you would like to return to the screen and save your modifications before proceeding.

Customizations

The screens available from the **Manage Activities** tab and all of the fields on them are custom created for the College of Human Ecology and the associated departments and school. These screens are amendable if there is a need to make changes. To propose changes, contact your Administrator (Bronwyn Fees, Associate Dean), using the Help [?] link.

ADDING NEW ITEMS

When you enter data, you will notice that most of the screens have an option that says +Add New Item. Choose this button to enter your data (see also COPY section below). To edit an old item that appears in the "Add New Item" screen, click on the pencil icon. If you would like to delete an item, click on the trashcan icon. If you choose to delete a record, a prompt will pop-up to confirm your decision to delete a record. **PCATS** allows you to save partial records and data by using the Save button in the form. To add a new record, click the +Add New Item button.

UPDATING RECORDS

To reduce data entry time, use the Duplicate button to copy another entry that requires only a few changes. For example, if you enter a Journal Article on the "Publications and Written Reports" screen and later publish a similar article in a Magazine/Trade Publication, you can duplicate your original entry and simply adjust dates/type as needed. This eliminates the need to re-key all data elements to create the second, and subsequent, publication entries.

SAVING YOUR WORK

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 + Add Another button, your information will be saved, and a new blank form will appear to allow input of another item. Cancel will take you to the "Add a New Item" screen if you are entering a record or the Main Menu if you are filling out a form.

MANUAL DATA ENTRY

Though some fields automatically populate, most fields require manual data entry within text boxes. These text boxes generally will allow you to input as many characters as you would like. They are freeform and do not have any data validation built in. For fields requiring manual entry within text boxes, you may expand these by clicking on the arrow next to the box.

Expanding Text Boxes

You may see two diagonal lines in the bottom right corner of text boxes. Clicking this area and dragging allows you to resize the text box as needed.
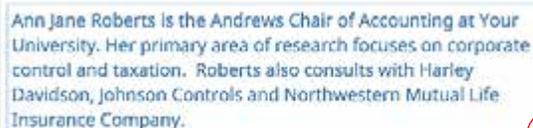
DATES

<u>Make sure you enter dates</u> 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.

- **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 dates.

PASTEBOARD

You will find the PasteBoard to be a timesaving feature. The PasteBoard allows you to copy text from an external document, such as your vita in Microsoft Word, and paste it into the PasteBoard. After you have pasted text into the PasteBoard, you can then select text from it, click-and-hold on the text you selected, and drag it into a field to have the text pasted into the field you want.

To access the PasteBoard, click the text PasteBoard in the left-hand menu under Manage Activities. The PasteBoard will appear in the bottom right-hand corner of your screen and can be dragged anywhere on the screen as needed. Any text in the PasteBoard upon logging out will remain in the PasteBoard for future sessions.

FACULTY INFORMATION

This manual for **PCATS** will help faculty and administrative staff become familiar with the system. Verify with your College administrator, which information fields you need to complete. Digital Measures **PCATS** 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 **PCATS** can best meet their needs. The options found when selecting "Manage Your Activities" include four categories of information: **Teaching; Research, Scholarship, Creative Activity, and Discovery; Engagement/Extension/Service/Outreach; and General Information.** Find additional information for each category and the associated screens below.