FAR@Penn Guidebook for Administrators

This guidebook provides useful information and step-by-step instructions for school, division, and department administrators using the Faculty Activity Reporting (FAR) tool. Visit https://faculty.upenn.edu/resources/faratpenn/ for additional resources and reach out to the Office of the Vice Provost for Faculty at FA-Project-Help@pobox.upenn.edu with any questions.

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What is FAR?

Faculty Activity Reporting (FAR) is a tool that faculty use to record and maintain details of their professional history. Faculty can then use that data to populate annual reviews, promotion and tenure cases, award nominations, and more. FAR pulls in publications from a massive data pool and enables faculty to easily validate scholarly work records (via the unique Interfolio Data Service).

Up-to-date faculty profiles serve as a reference point for administrators, who can go into the system for answers to their queries rather than reaching out again to faculty members.

The FAR system enables Schools to have streamlined workflows to capture faculty data, integration capabilities with central and school-based data sources, and customizable faculty reporting capabilities

Who can access FAR and FAR data?

The following people can access FAR:

- **Associated, emeritus, standing, and standing CE faculty** use FAR to maintain data about scholarly activities, professional experience, etc.
- **University and school FAR administrators** – These populations, which include deans and department chairs, can view and report on faculty activity data. These users can also make updates to faculty to support faculty use of the tool.
- **Designated support accounts** - These are users who can support entry of faculty data into FAR. These users are granted access at a school, division, or department level by the Office of the Vice Provost for Faculty at the request of school, division, or department administrators.

What data are included in the system?

We are bringing the following data into FAR from other University systems:

FAR Section	Data Source
Faculty Name and Email	Workday
Current Position(s)	Workday
Education	School Sourced and Workday
Appointment History	Workday
Achievements and Awards	School Sourced
Advising Load	Pennant
External Service	School Sourced
Externally-Funded Grants	PennERA
Fellowships	School Sourced
Institutional Committees	School Sourced
Mentorship/Supervision	Pennant
Penn Internally-Funded Grants	Office of the Vice Provost for Research
Professional Membership	School Sourced
Scholarly Contributions and Creative Productions	Initial load of Scholarship data provided by Library. Ongoing data will be provided by Interfolio's Data Service (IDS).
Teaching	Pennant

Why were certain decisions made about data?

Our goal is to leverage sets of data that are already being maintained at Penn, like PennERA and Workday, in an effort to reduce the amount of manual input for faculty. The FAR@Penn team will continue to explore opportunities for incorporating Penn data into the FAR product.

Who can see a faculty member's data?

Faculty data is viewable by FAR administrators in the Provost's Center and school administrators. In addition, faculty can designate others who will then have the ability to view and update that faculty member's data. All faculty in FAR will have the ability to use the Find Colleagues tool in FAR, which allows faculty to search for colleagues with specific interests and backgrounds. See the Find Colleagues section of the **FAR@Penn Guidebook for Faculty** and the **FAR@Penn Find Colleague Fields** document posted at https://faculty.upenn.edu/resources/faratpenn/#HelpNews for more information on how to use Find Colleagues and what data are included and visible in this tool.

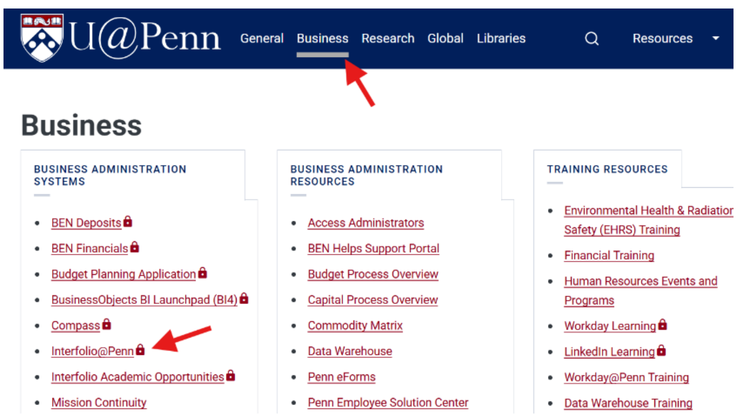
How to Request Access for a Non-Faculty User

Faculty accounts are created each day by way of an integration with Workday. Non-faculty accounts, such as administrator and support accounts, are created and maintained by the Office of the Vice Provost for Faculty. To have a new support account created, send an email to fa-project-help@pobox.upenn.edu. Include the person's name, Pennkey, Penn ID, unit, and the level of access they should have (unit administrator, emulate only, or emulate with reporting access). If you have any questions, we're happy to help you determine the right level of access.

Logging in to FAR

A link to Interfolio is posted on the U@Penn website. You can also bookmark this direct link: https://home.interfolio.com/31697. To find the Interfolio link on the U@Penn site:

1. Navigate to the **U@Penn** page.
2. Click on the **Business tab** at the top of the page.
3. Click the **Interfolio@Penn** link in the Business Administration Systems box.

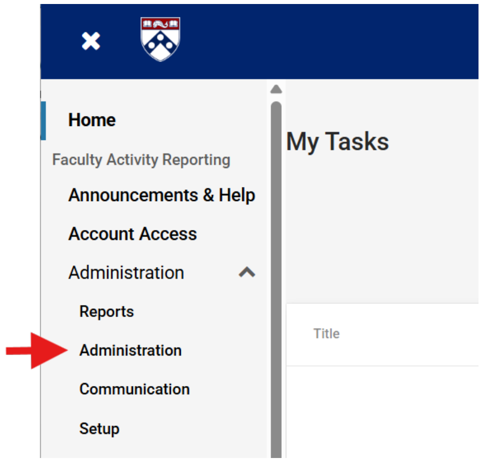


4. Once you click the link to Interfolio, you will now see Penn's login window where you can enter your Pennkey and password.

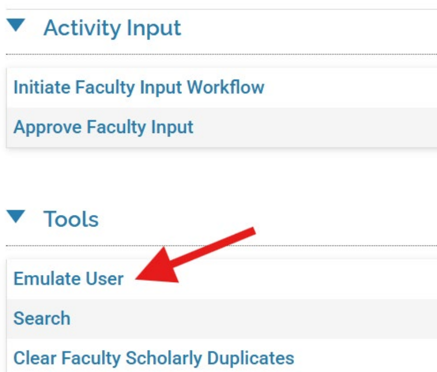
How to Emulate Faculty

Administrators and support accounts can emulate faculty in their units. In addition, faculty can grant specified users the ability to emulate them in FAR. To emulate a faculty user with a primary or secondary appointment in your unit, follow the instructions below:

1. Click on the **Administration** tab on the left-hand menu followed by **Administration.**



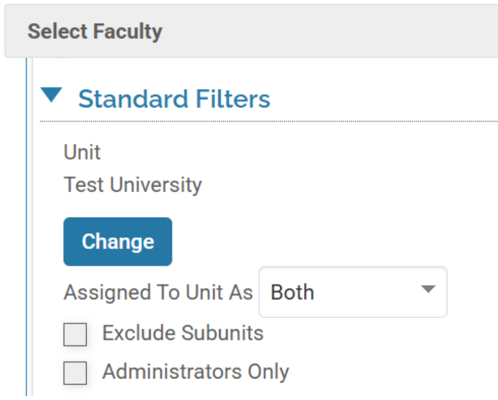
2. Now click on **Emulate User** under the **Tools** section.



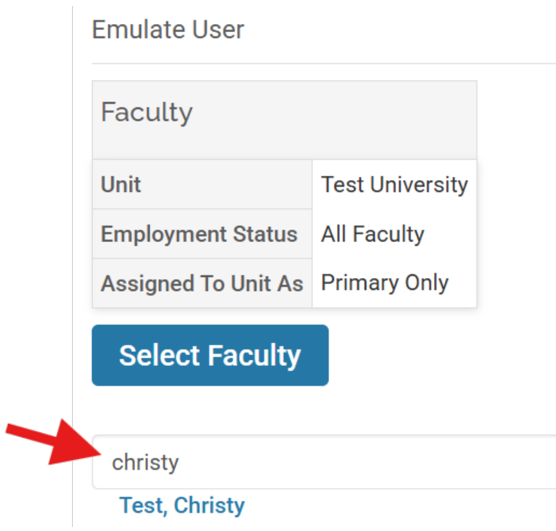
3. You will now see a list of the units to which you have access. There is a number count showing you how many faculty there are in each unit. You can click on the number next to the unit of the user you would like to emulate to see a list of the faculty in that unit.

Unit	Total	Attached In	
		University	School
⊟ University of Pennsylvania	5970	7	-
⊞ Annenberg School for Communication	27	-	27
⊞ Graduate School of Education	96	-	13
Office of the President	1	-	1
⊞ Office of the Provost	2	-	-
⊞ Penn Carey Law	65	-	65

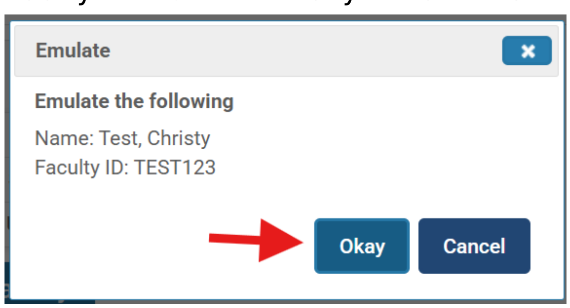
4. Optionally, you can use the Select Faculty button to change to a different unit, include administrators, and/or include faculty who have a secondary appointment in your unit.



5. If needed search for the name of the person you'd like to emulate and click on their name.



6. FAR will ask you to confirm that you want to emulate the user.

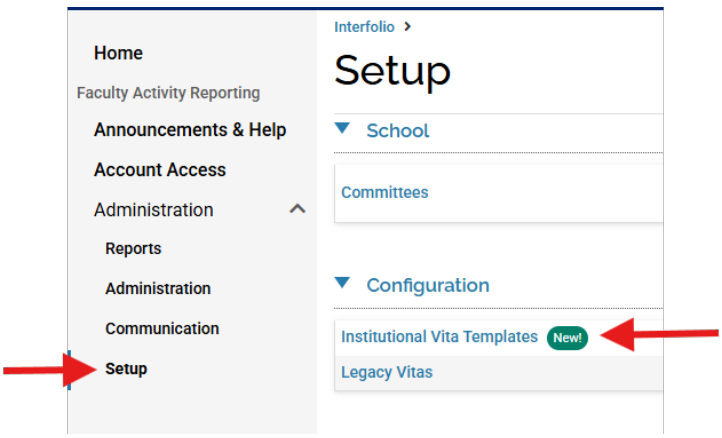


7. You are now viewing FAR as the person you are emulating.
8. See the FAR@Penn Guidebook for Faculty sections with instructions for faculty to learn more about how to navigate and interact with FAR as a faculty member.
9. To exit emulation, click the **Exit Emulation** button in the upper right corner.

How to Generate a Vita Template as an Administrator

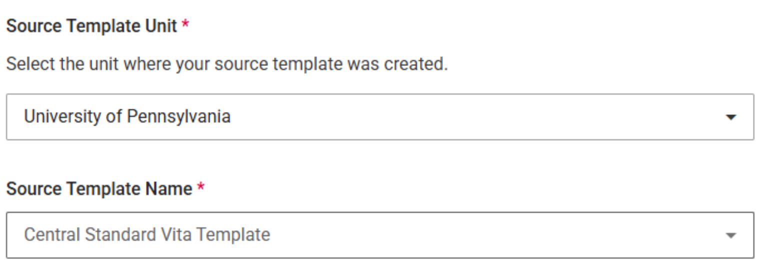
Faculty can create vitas by using an existing institutional template. You can also create your own personal template to highlight and include activities and profile data in a format that meets your specific needs. Follow these steps to create a personal vita template:

1. Click on the **Setup** tab on the left navigation menu.

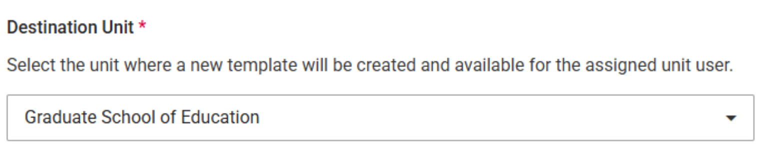


2. Chick **Institutional Vita Templates** under **Configuration**.
3. To create a new template, click the **Create New Template** button.

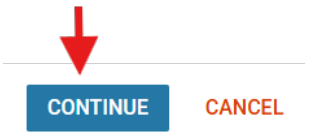
4. When creating a new template, FAR requires you to select an existing template to use as the foundation. Select the unit and source template you would like to use.



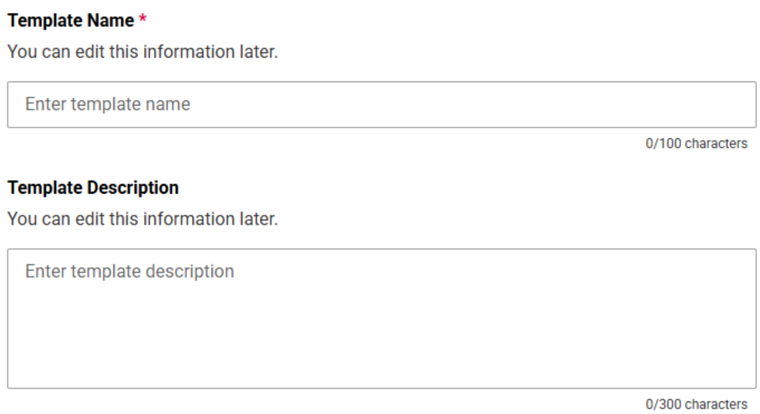
5. Select a destination unit. This template will be available for use by faculty in the select unit.



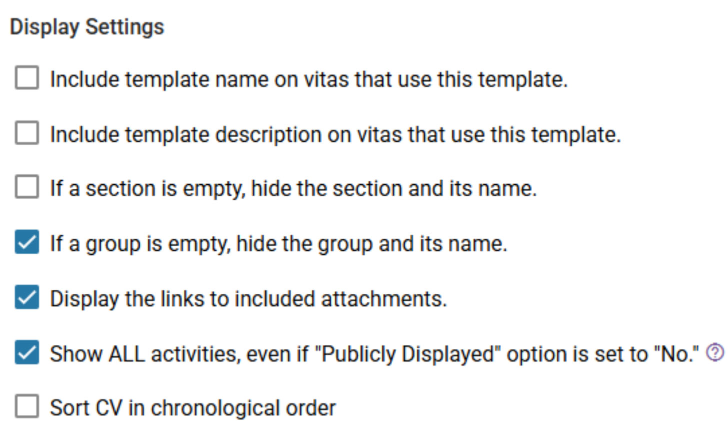
6. Click **Continue**.



7. An institutional template can be:
    a. **Linked** - If the source template is edited, any changes will apply to all templates linked to the source template.
    b. **Unlinked** - A change to an unlinked template does not affect other templates
8. Enter a template name and an optional template description.



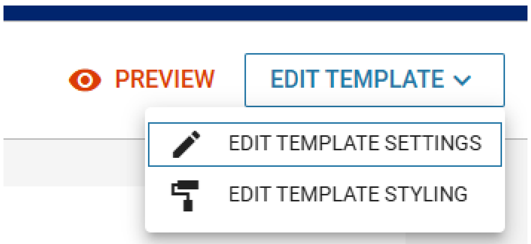
9. Read through the optional display settings and check any as needed. Note that these settings can be changed later.



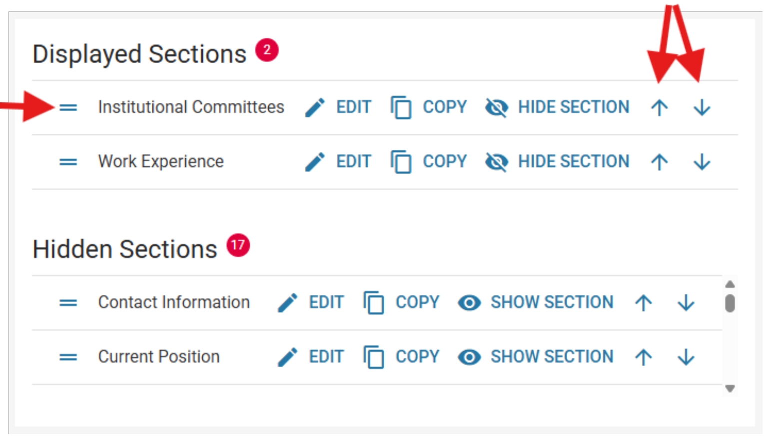
10. Now you have two options:

    a. Click **Save as Draft** if you want to save your progress but not make this template available to faculty just yet. If you select this option, you can make the template available to faculty at a later time.
    b. **OR:** Select **Create and Activate** to save and make this template available for faculty immediately.

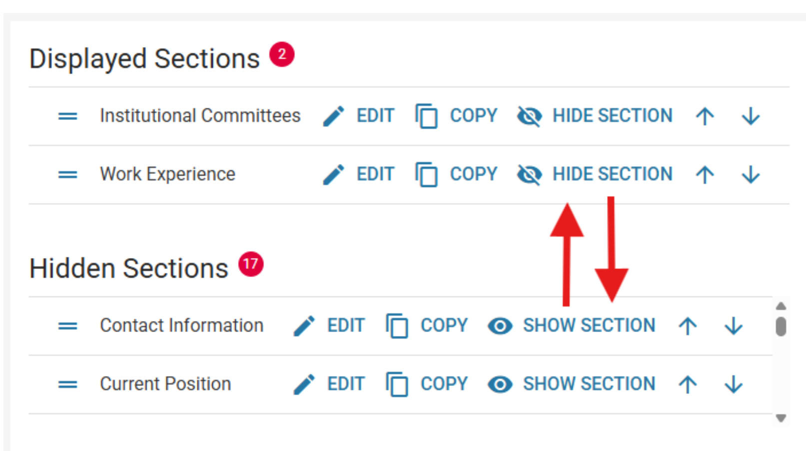
11. No matter which option you select in the previous step, you will now be taken to the template builder, where you can edit the layout and the content of the template to meet your needs. Here are some options:
    a. Use the **Edit Template** button at the top of the page to make changes to template settings (the optional checkboxes we encountered earlier in this process) and the template styling, which includes the styling of titles, fonts, and paragraphs.



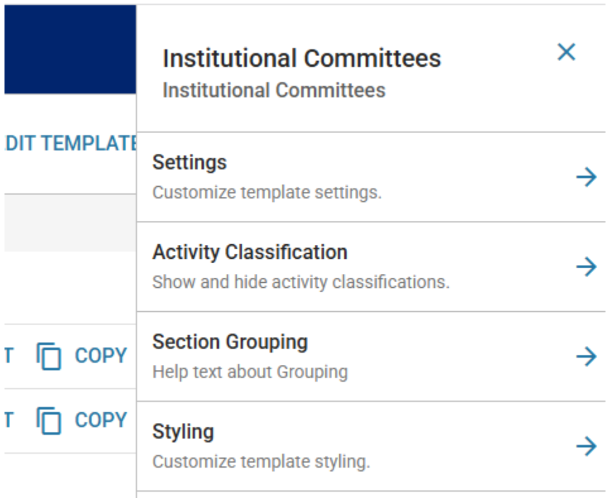
    b. Use the **up and down arrows** to the right of each section or grab the section using the two lines on the left and drag the section where you'd like it to go.



    c. You can hide and show sections by using the **Hide Section** and **Show Section** buttons.



    d. When you click the **pencil Edit** button you can edit the name of the section, which fields are shown in the section, and styling details.



12. Save your changes by clicking the **Save/Save Draft** buttons at the top of the page. Use the **Activate Template** to make this template available to faculty, if it has not already been activated.

How to Create Initiated Input Campaigns

Initiated input campaigns allow FAR administrators to request specific activity details from faculty during a defined timeframe. To get started, school administrators can reach out to University FAR admins at FA-Project-Help@pobox.upenn.edu for assistance in getting the school's input form set up with the desired sections and requirements.

Check out this Interfolio page for in-depth configuration options and details on using initiated input forms and campaigns:

https://product-help.interfolio.com/en_US/activity-input-periods/activity-input-initiate-faculty-input-process

How to Run Reports

FAR administrators can run several predefined reports that provide insight into both aggregated and detailed scholarly activities data. Administrators are encouraged to try each report and the various settings to find those reports that are most helpful for the administrator's data needs. In-depth details on each report can be found here:

https://product-help.interfolio.com/en_US/reports