

FAR@Penn Guidebook for Faculty

This guidebook provides useful information and step-by-step instructions for faculty using the Faculty Activity Reporting (FAR) tool. Visit

<https://faculty.upenn.edu/resources/faratpenn/> for additional resources.

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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 also 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 this document](#) for more information on what data is included and visible in this tool.

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 see Penn’s login window where you can enter your Pennkey and password.

Profile vs Activity Data

Each faculty member’s data in FAR is divided into two main sections called profile data and activity data.

- **Profile data** includes information that rarely changes about a faculty member and includes items like biographical information, position history, and education details.
- **Activity data** includes items that change more frequently, like committee membership, scholarly activities, mentorship, and professional development activities.

How often should I update my data in FAR?

There are several factors that influence how often you interact with FAR:

The Interfolio Data Service (IDS) is technology that populates FAR in bulk with accurate data on faculty members' academic work. It pulls from sources like CrossRef, OpenAlex, and Scopus, covering over 250 million activities published in more than 60,000 journals, government systems, and authoritative outlets.

Throughout the year, IDS collects information on faculty publications, such as books, book chapters, journal articles, and proceeding publications. When an incoming record is matched to you, you can then validate the academic data associated with it before it is saved to your Interfolio profile. Only after you validate your data will it be stored in your FAR profile.

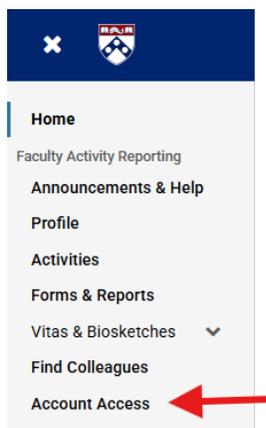
Besides reviewing incoming publication details, it is a good idea to review and update your data in FAR periodically, especially if you have new items to add such as scholarly activities and committee memberships.

Your school, division, or department may request that you update your data more frequently or at a set period of time during the year. When this is the case, you will receive information from your school, division, or department with instructions on how to update your data.

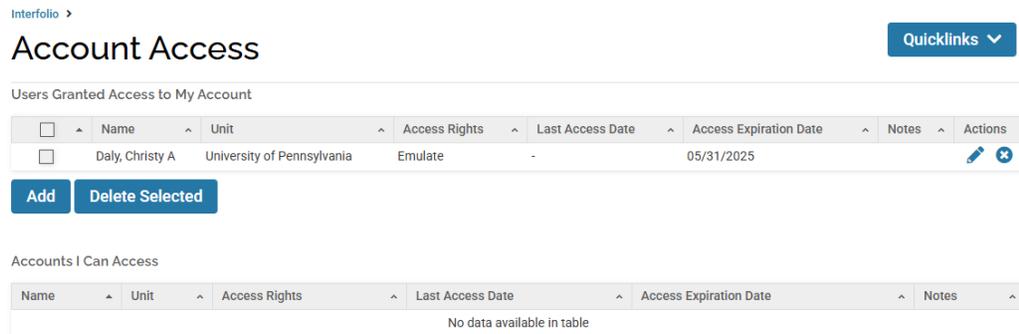
How to Grant Others the Ability to Access your Data

As a faculty member, you can assign proxy users in Faculty Activity Reporting (FAR) to access your CV information and reports. These users will be able to emulate you in FAR, which gives them the ability to view and edit your data, vita templates, and vitas. The steps below will guide you through adding a proxy user, but you can also edit and remove proxy users on this Account Access screen.

1. Click **Account Access** to navigate to the Account Access page where you can view a list of Users Granted Access to My Account and Accounts I Can Access with information such as the name and unit of the account, the level of Access Rights, the last access date, and the access expiration date.



- The Account Access page is where you can view a list of Users Granted Access to My Account and Accounts I Can Access with information such as the name and unit of the account, the level of Access Rights, the last access date, and the access expiration date.



Interfolio >

Account Access Quicklinks ▾

Users Granted Access to My Account

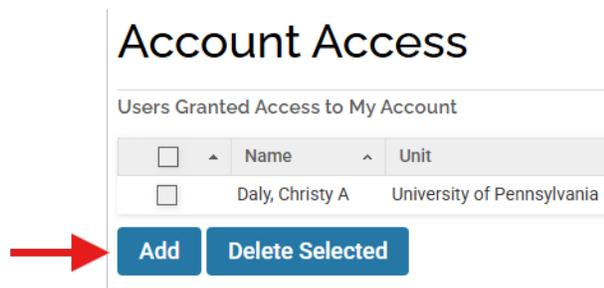
| <input type="checkbox"/> | Name | Unit | Access Rights | Last Access Date | Access Expiration Date | Notes | Actions |
|--------------------------|-----------------|----------------------------|---------------|------------------|------------------------|-------|---------|
| <input type="checkbox"/> | Daly, Christy A | University of Pennsylvania | Emulate | - | 05/31/2025 | | |

Add **Delete Selected**

Accounts I Can Access

| Name | Unit | Access Rights | Last Access Date | Access Expiration Date | Notes |
|----------------------------|------|---------------|------------------|------------------------|-------|
| No data available in table | | | | | |

- To grant someone access to your FAR account, click **Add** under the Users Granted Access to My Account section.



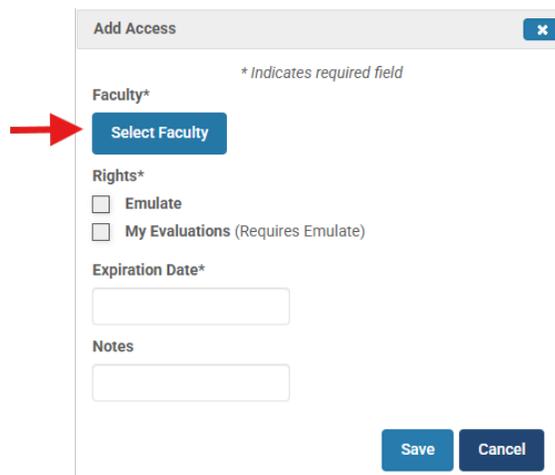
Account Access

Users Granted Access to My Account

| <input type="checkbox"/> | Name | Unit |
|--------------------------|-----------------|----------------------------|
| <input type="checkbox"/> | Daly, Christy A | University of Pennsylvania |

Add **Delete Selected**

- Click the **Select Faculty** button to choose faculty members or support accounts for proxy access. Use the Faculty Selection Tool to search and filter accounts and select faculty to provide proxy access.



Add Access ✕

** Indicates required field*

Faculty*

Select Faculty

Rights*

Emulate

My Evaluations (Requires Emulate)

Expiration Date*

Notes

Save **Cancel**

- Optional: You can narrow down your search to one specific area of the university by clicking the **Change** button and selecting a new unit.

▼ **Standard Filters**

Unit
University of Pennsylvania

Change ←

Assigned To Unit As Primary Unit ▼

Show Support Accounts

- Optional: You can search for faculty who have a primary or secondary appointment in the selected unit by changing the selected option in the **Assigned To Unit As** list.

▼ **Standard Filters**

Unit
University of Pennsylvania

Change

Assigned To Unit As Primary Unit ▼ ←

Show Support Accounts

- Optional: Check the **Show Support Accounts** checkbox to include people who have non-faculty administrative roles in FAR, like faculty coordinators, in the search results.

▼ **Standard Filters**

Unit
University of Pennsylvania

Change

Assigned To Unit As Primary Unit ▼

← Show Support Accounts

- You can type all or part of the person's name in the **Search** bar at the top of the page or click the number of records displayed in the Available column followed by the **List** button to view a list of people who match your search criteria.

Search

Select Individual Faculty

→

Available

▼ **Standard Filters**

Unit
University of Pennsylvania

Change

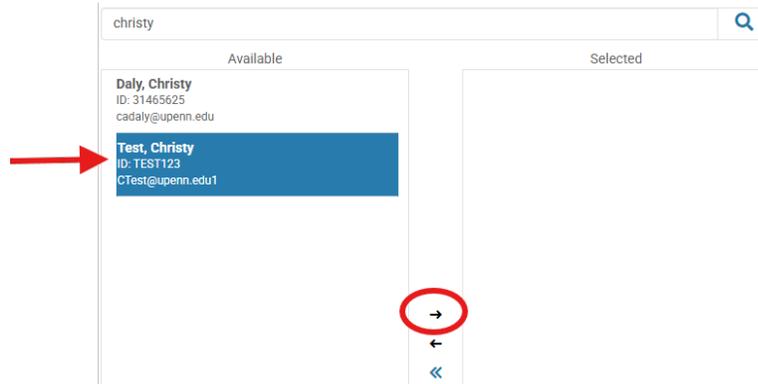
Assigned To Unit As Primary Unit ▼

Show Support Accounts

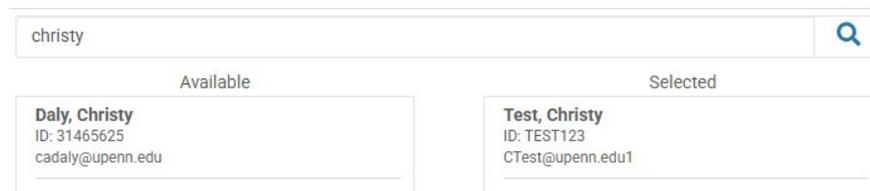
| |
|---|
| <p>Daly, Christy ID: 31465625 cadaly@upenn.edu</p> |
| <p>Test, Christy ID: TEST123 CTest@upenn.edu1</p> |

- Now you can select the person's record in the Available column and move them to the Selected column.

a. Before:



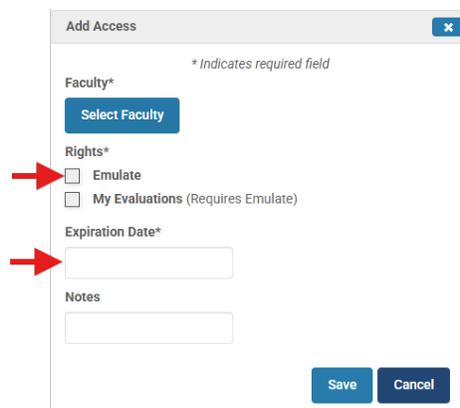
b. After:



9. Save your changes by clicking the **Select Faculty** button.



10. Now that you have selected the faculty/staff person who can access your account, check the **Emulate** checkbox and set a date on which the access should expire.



11. You can add an optional note.

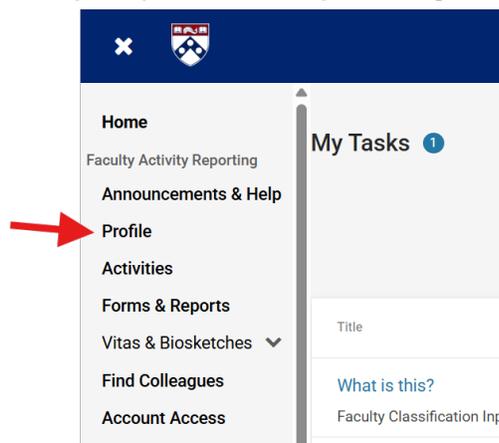
12. Click Save.



How to Review and Edit Profile Data

Profile data in far contains information about you that rarely changes. This includes your name, contact information, your current position, and position history. Follow these steps to make updates to your profile information:

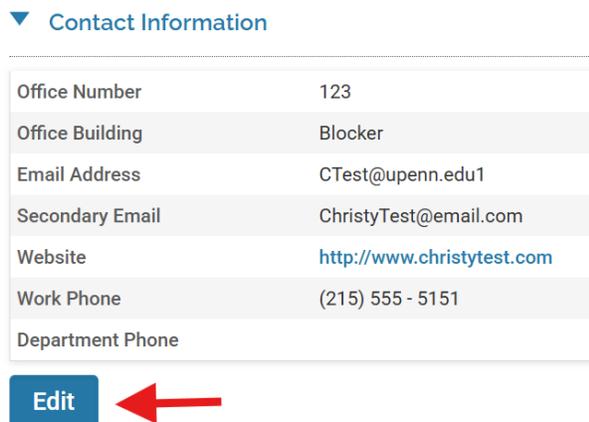
1. Navigate to your profile data by clicking the **Profile** tab on the left-hand menu.



2. Use the arrow next to each section to expand the section and view the data inside.



3. Some sections contain data that can be edited directly in FAR. If you see an edit button at the bottom of a section, that indicates that you can edit the details in that section.



4. Many sections in FAR contain data that is brought in from non-FAR systems, like Workday. Click on the **Help (?)** to view instructions on how to update data in that section. For example, if you'd like to make changes to your education data, the help text in that section will guide you to Workday where you can make corrections. The updated Workday data will then be posted to FAR within a set period as specified in the help text.

- ▶ [Contact Information](#) ? Help

- ▶ [Current Position](#) ? Help

- ▶ [Education](#) ? Help

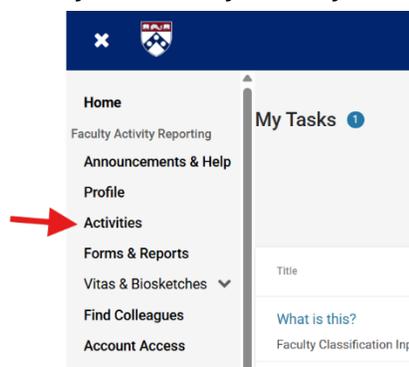
- ▶ [Penn Appointment History](#) ? Help

- ▶ [Work Experience](#) ? Help

How to Review and Edit Activity Data

The activity data in FAR contains information about you that might change frequently, including achievements, invited talks, professional development activities, and grants. Follow these steps to review and update your activity data in FAR:

1. Navigate to your activity data by clicking the **Activities** tab on the left-hand menu.



2. Use the arrow next to each section to expand the section and view the data inside.



3. Some sections contain data that can be edited directly in FAR. If you see **Add**, **Edit (pencil)**, and **Delete (X)** buttons, that indicates that you can edit the details in that section.

▼ [Achievements](#) ? Help

Use this section to maintain details of your achievements, honors, and awards.

| Achievement Title ^ | Year Conferred ^ | Conferring Organization ^ | Further Details ^ | Start Semester ^ | End Semester ^ | Type of Achievement ^ | Actions |
|----------------------------|------------------|---------------------------|-------------------|------------------|----------------|-----------------------|---|
| List of excellent teachers | 2025 | Texas A&M University | | Spring 2025 | Ongoing | Award |    |

[Add](#) 

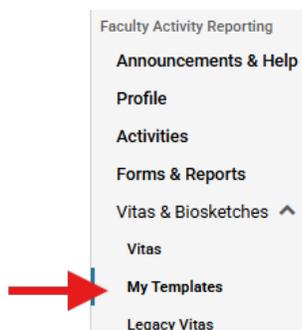
- Many sections in FAR contain data that is brought in from non-FAR systems, like Workday. Click on the **Help (?)** to view instructions on how to update data in that section. For example, if you'd like to make changes to your fellowship data, the help text in that section will guide you to Workday where you can make corrections. The updated Workday data will then be posted to FAR within a set period of time as specified in the help text.



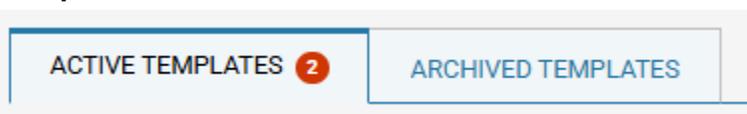
How to Generate a Vita Template

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:

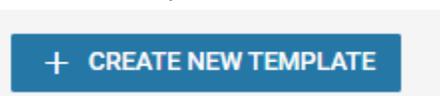
- Click on the **Vitas & Biosketches** tab on the left navigation menu followed by **My Templates**.



- The **My Templates** area has two sections:



- Active Templates** - This is a section where you will find your active vita templates. You can edit or archive templates found here.
 - Archived Templates** - This section contains your archived templates. You can restore or delete templates you see listed here
- 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. Note that you can select one of your personal templates or an institutional template as the source. Select the unit and source template you would like to use and click **Continue**.
5. Enter a template name and an optional template description.

Template Name *
You can edit this information later.

Enter template name

0/100 characters

Template Description
You can edit this information later.

Enter template description

0/300 characters

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

Display Settings

- Include template name on vitas that use this template.
- Include template description on vitas that use this template.
- If a section is empty, hide the section and its name.
- If a group is empty, hide the group and its name.
- Display the links to included attachments.
- Show ALL activities, even if "Publicly Displayed" option is set to "No." [?](#)
- Sort CV in chronological order

7. Click **Create Template**.

← PREVIOUS

CREATE TEMPLATE

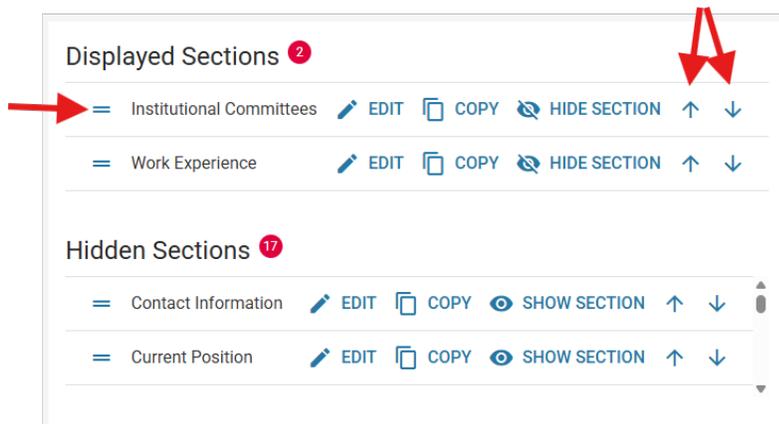
CANCEL



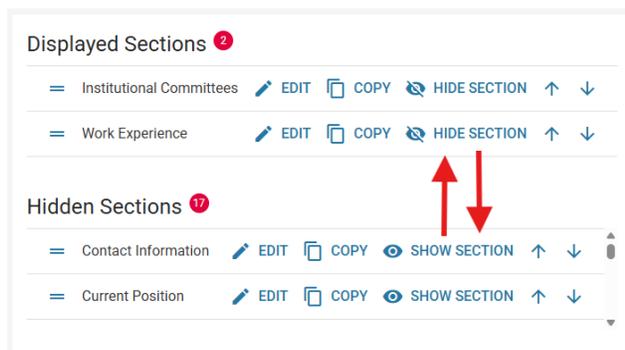
8. In the template builder, you can edit the layout and the content of the template to meet your needs. Here are some options:
 - a. Use the **Edit Template Styling** button at the top to modify the font, headings, and paragraph styles for the entire template.



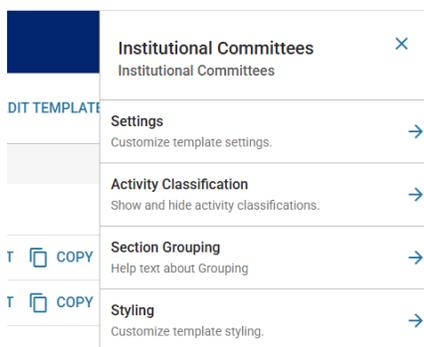
- b. Use the **up and down arrows** to the right of each section or grab the section using the two lines on the left and drag the section where you'd like it to go.



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



- d. By clicking the **pencil Edit** button in each section, you can edit the name of the section, which fields are shown in the section, and styling details.



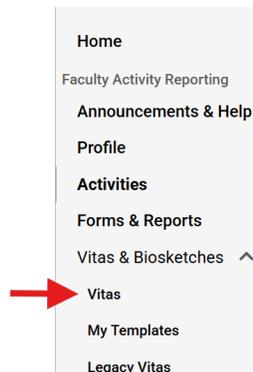
9. Save your changes by clicking the **Save** button at the top of the page.



How to Generate a Vita

Vitas (CVs) display your activity and profile data in a shareable, exportable format. Follow these steps to generate a vita in FAR:

1. Click on the **Vitas & Biosketches** tab on the left-hand menu followed by **Vitas**.



2. The vitas page has three tabs:



- a. **Institutional Vitas** – These are vitas generated using a template defined by the institution at the topmost University of Pennsylvania level or by a school, division, or department.
 - b. **Personal Vitas** – These are vitas that have been generated using a template that you created in FAR.
 - c. **Archived Vitas** – These vitas were previously in the institutional vitas or personal vitas tabs that have been archived. You can restore or delete these vitas.
3. In either the institutional vitas or personal vitas area create a new vita by clicking the **Add New Vita** button.



4. Select the type of vita you want to create – either personal or institutional.

Select the type of vita you want to add *

- Personal
Generate vita from a personal template. You can edit section settings/stylings on the template in order to modify the vita output
- Institutional
Generate vita from an institutional template. You can add custom text but cannot change any section settings/styling on the vita output.

5. Next enter a name for your vita and an optional description.

Vita Name *

Description

6. If you are creating an institutional vita, you will now select a unit. This step is not required if you are creating a personal vita. Note that the unit you select will impact which vita templates are available for you in the next list. If your school, division, or department has created a vita template for you to use, select that school, division, or department to locate the vita template.

7. Select a vita template to use.

Select Template *

8. Now click **Add New Vita**.

Select Template *

 **ADD NEW VITA** **CANCEL**

9. When the vita preview loads you can select the date range that you would like to use when displaying information about activities.

Select Date Range Type Select Start Term Select End Term

Academic Term Calendar Year Fall 2024 - Spring 2025

10. You can add additional text in each section by clicking the **pencil** icon next to the section.

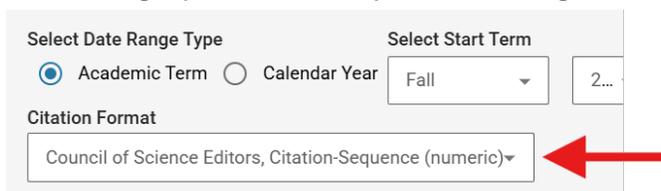


Personal Information

First Name: Christy

Last Name: Test

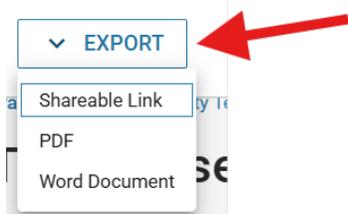
11. If you are creating a personal vita, you can change the citation format.



12. Once you've made the needed changes to your vita click the **Save** button at the top of the page.



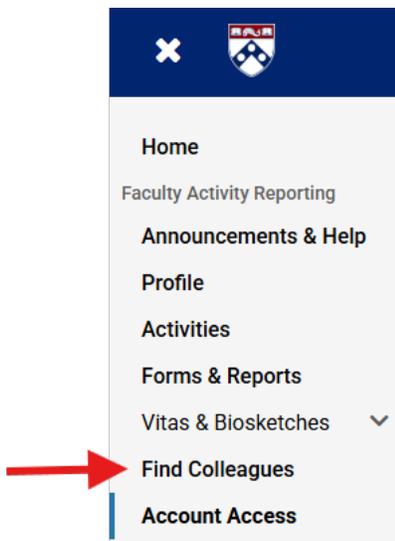
13. You can export your vita as a shareable link, as a pdf, or as a Word document using the **Export** button at the top of the page.



Using the Find Colleagues Tool

Find Colleagues as a tool in FAR that helps you find faculty at Penn who have similar interests and activities. Follow the steps below to use the Find Colleagues tool:

1. Click **Find Colleagues** in the left-hand menu.



2. Select which **profile or activity section** you would like to search.

Select Profile or Activity Sections to Search *

- Penn Appointment History
- Achievements
- External Service
- Externally-Funded Grants
- Institutional Committees
- Penn Internally-Funded Grants
- Professional Membership
- Scholarly Contributions and Creative Productions
- Orcid ID

3. Select the **highest unit** in which you would like to search. If you select ‘University of Pennsylvania,’ this allows you to find faculty in any school. You can narrow your search by selecting a unit within a school or division. Note that you can type to search:

Select Unit *

- Annenberg School for Communication**
- Annenberg Public Policy Center
- Annenberg School for Communication | Level 2
- Annenberg School for Communication | Level 3

Search

4. Based on the profile or activity section you’ve selected above you might be asked to enter a **year range** for the activities.

Select Year Range *

2024

▼

to

2025

▼

5. Enter a **search keyword**. Note that if you enter multiple keywords, each keyword is searched independently. For example, if you search for the phrase “linear algebra,” FAR will return records with the words linear or algebra in the details.

Enter Keyword *

6. Click the **Search** button.

Search

- The search results will include each faculty member’s first and last name along with limited details of the activity that matched your search criteria.

Found 1 Matching Records

| First Name | Last Name | Type | Title |
|------------|-----------|------|-------------------------|
| Christy | Daly | Book | Life with Goldie |

- Click the **Contact** button to view the faculty member’s contact details, which could include phone number, office location, and email address. These contact details are added and maintained by each faculty member in FAR.

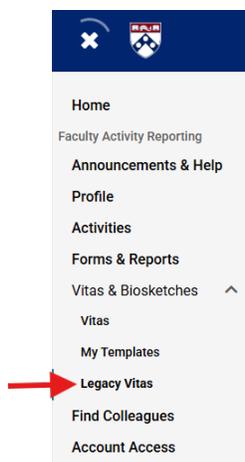
| Status | Semester | Contact |
|---------------------|----------|--|
| Completed/Published | 2025 |  Contact |

- See 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.

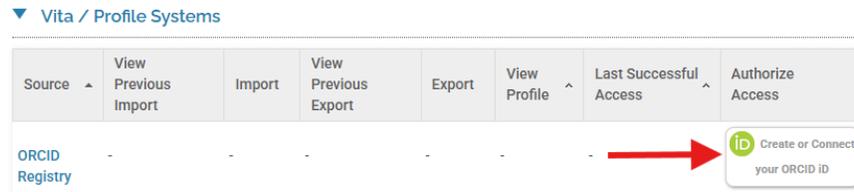
How to add your ORCID iD

ORCID is a free, unique, persistent identifier (PID) for individuals to use as they engage in research, scholarship, and innovation activities. Follow the instructions below to add your ORCID iD in FAR:

- Click **Vitas & Biosketches** in the left-hand menu, followed by **Legacy Vitas**.



2. Scroll to the bottom of the page.
3. In the **Vita / Profile Systems** table click the Create or Connect your ORCID iD button.



4. You will be redirected to a login page for <https://orcid.org/>
5. To grant FAR access to your ORCID account, **sign in to ORCID** or **Register Now** on the page that displays.
6. After you **Authorize Access** on the next screen, you will be automatically redirected back to FAR. There, you will see a message confirming that access has been successfully granted, along with a **hyperlinked ORCID URL** in the View Profile column.