# Using Interfolio Faculty180 for Review, Promotion, and Tenure

This document serves as a guide for URI users of Interfolio's Faculty180. This guide illustrates, with instructions and screenshots, how faculty can organize and report their activities using Faculty180, allowing them to leverage this information to develop materials for their RPT case. Information on dossier development is available in the Guidance for Review, Promotion and Tenure (RPT) Dossier Development guide.

## Contents

Introduction to Interfolio	2
Interfolio - Faculty180 (F180)	2
Navigating Faculty180	3
Home page	3
Profile Form	4
Activities Form	5
Start and End dates for activities.	6
Creating the Candidate Profile and Period-of-Review vita	7
Candidate Profile and Period-of-Review Tabulation of Accomplishments	9
Professional Information	9
Degrees Earned	10
Prior Employment History	10
Awards and Honors	11
Teaching, Learning and Advising	12
List of Courses Taught by Semester	12
Major Course/Curriculum developments or revisions	12
Independent Studies and Other Learning Projects	13
Student Advising	14
Graduate Student Mentoring	14
Other Student Mentoring	15
Research, Creative, and Other Scholarly Activity	16
Scholarly/Creative Works	16
Intellectual Property	18
External and Internal Funding & Grant Proposals	19
Student Engagement in Funded Research	21
Service and Professional Outreach	21

Institutional Committees	21	
Other Institutional Service	22	
Professional Service/Outreach	23	

# Introduction to Interfolio

Interfolio is an internationally recognized leader in the Faculty Information Systems (FIS) space providing web-based software solutions for higher education. The University of Rhode Island currently uses two Interfolio platforms – Review, Promotion and Tenure and Faculty180. These two systems work together to support faculty reviews in distinct but complementary ways. A simple way to look at the synergistic solution is as follows - RPT provides a space for faculty to submit comprehensive tabular summaries of the period of review activities, whereas Faculty180 provides a space for faculty to track individual activities in real time. Faculty who track their activities in Faculty180 can take advantage of the form/vita creation function and quickly create and submit the Period-of-Review summary document in RPT. This guidance document provides detailed information on tracking faculty activities through Faculty180.

# Interfolio - Faculty 180 (F180)

Interfolio's Faculty180 (F180) is a Faculty Activity Reporting software that provides faculty a convenient central location to organize Teaching, Research, and Service activities. Once faculty enter their activities in the Faculty180 system those activities can be used to generate the Candidate Profile and Period-of-Review Tabulation of Accomplishments vita.



# Navigating Faculty 180

A general Faculty180 guide can be found on <u>URI's Faculty180 website</u>, including videos and additional resources. This document is a condensed version with a focus on Faculty180 use in faculty reviews. Users should begin by <u>log in to Interfolio</u> (RPT & F180) using URI's single-sign-on.

This guide uses many naming conventions unique to Interfolio. Three terms that will be helpful to know and found throughout this guide are below and shown in the image that follows.

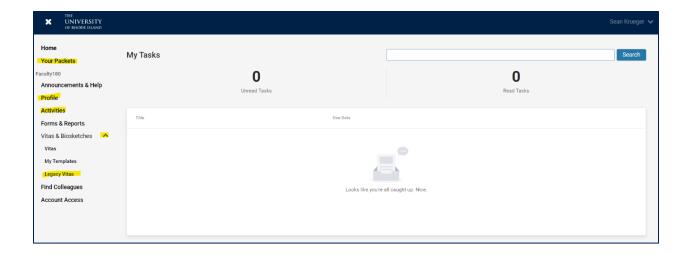
- Forms: There are two main forms (Profile and Activities). Forms are made up of sections.
- **Sections**: A type of faculty information, (e.g., teaching, scholarship, or service). Sections are made up of fields.
- **Fields**: Entry point for unique data, (e.g., names/titles, dates, and descriptions).



#### Home page

The Home page will be the first page shown when logging on and can be toggled to by clicking on the Home tab on the left.

- Your Packets: Found near the top on the left. This is where you will find your RPT case materials if you have an active case.
- **Profile**: Form used to collect directory level information. (e.g., Name, Degrees, Prior Employment, and Interests).
- **Activities**: Form used to enter faculty activities. (e.g., Scholarly Contributions, Courses Taught, Grants, and Student Advising).
- **Legacy Vitas**: Location where faulty can create the Candidate Profile and Period-of-Review vita used for RPT cases.



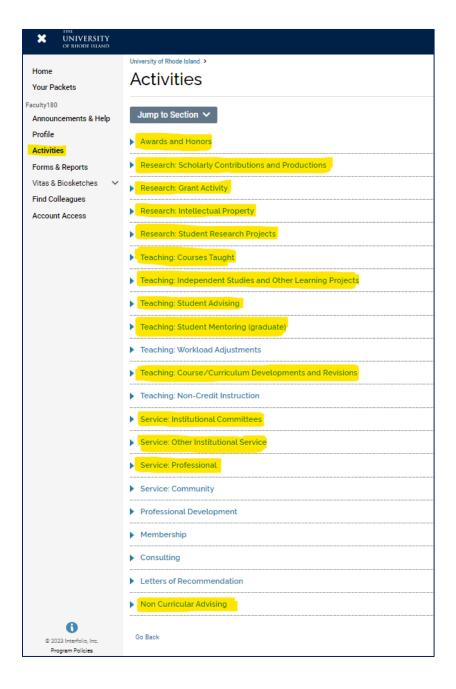
#### Profile Form

The **Profile** form, found on the left-hand side of the home screen and highlighted in the image below, and contains mostly directory level information. Some information is prepopulated through data sources at URI, while other sections require faculty to enter information. Each section can be accessed by expanding the section using the blue triangle before each heading or clicking on the name of each section. The Personal Information, Prior Employment History, and Degrees Earned sections are highlighted below and used in the creation of the Candidate Profile and Period-of-Review vita. Each of these sections is described in detail later in this guide.



#### **Activities Form**

The **Activities** form, found on the left-hand side of the home screen and highlighted in the image below, and provides a space for faculty to add, update, and validate their teaching, research, and service activities. Each section in the Activities form can be accessed by expanding the section using the blue triangle before each heading or selecting the section name. Many sections found in the Activities form are grouped into three recognizable areas: teaching, research, and service. Most of the sections will be identical to those used in the URI review, promotion, and tenure process, however there may be some unique sections for faculty in programs or colleges that use Faculty180 for accreditation. All sections that are part of the Candidate Profile and Period-of-Review vita are highlighted in the image below. Each of these highlighted sections is described in detail later in this guide.

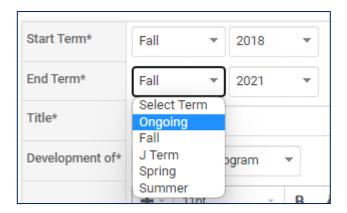


#### Start and End dates for activities.

Choosing the appropriate start and end dates is a simple yet important concept to understand before entering activities. The Term fields are used to indicate when a given activity takes place and can be used to identify activities that span multiple terms and years.

The Candidate Profile and Period-of-Review vita will include only those activities that occur within a specified date range. It is therefore important to track activities with their corresponding effective dates, to ensure that they are included in the relevant review period vita. There are two types of date fields in Faculty180 with slightly different instructions for each.

Scenario 1 – multi-semester activities: When <u>Start Term</u> and <u>Year</u> and <u>End Term</u> and <u>Year</u> fields are available in a section (see image below), the End Term and Year determine inclusion. For example, if there is an annual review period that encompasses the Academic Year 2024-2025, activities will be included with End Terms - Fall 2024, J-Term 2025, Spring 2025, Summer 2025, and Ongoing. Activities with Ongoing listed as the end term will always be included regardless of vita date range.



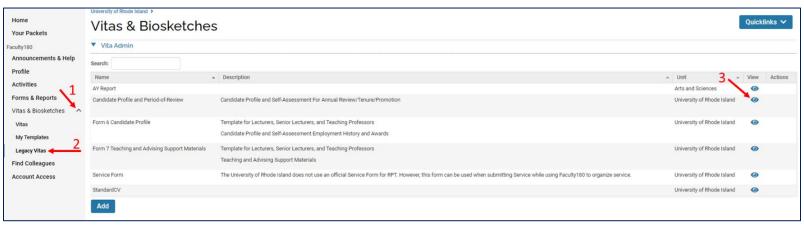
Scenario 2 – semester-specific activities: When only a single <u>Term</u> and <u>Year</u> fields is available in a section (see image below) the term and year should be inclusive of the review period. For example, if there is an annual review period that encompasses the Academic year 2024-2025. Activities will be included when the Term field is set to - Fall 2024, J-Term 2025, Spring 2025, and Summer 2025. There is no Ongoing option with the single Term field.

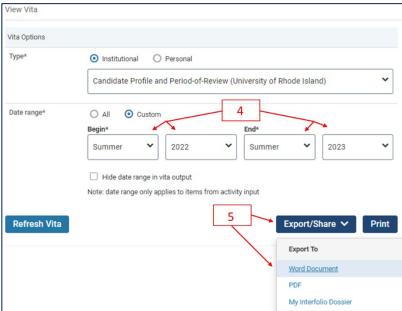


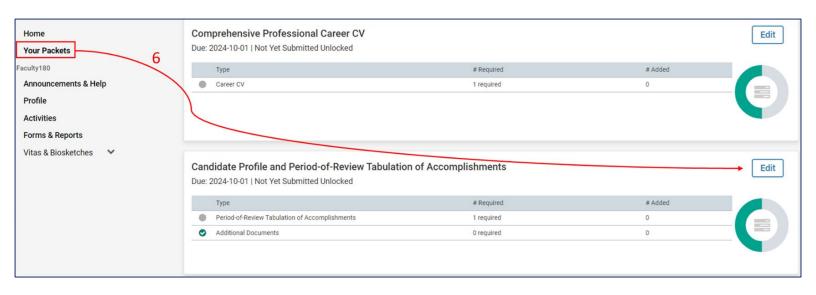
# Creating the Candidate Profile and Period-of-Review vita

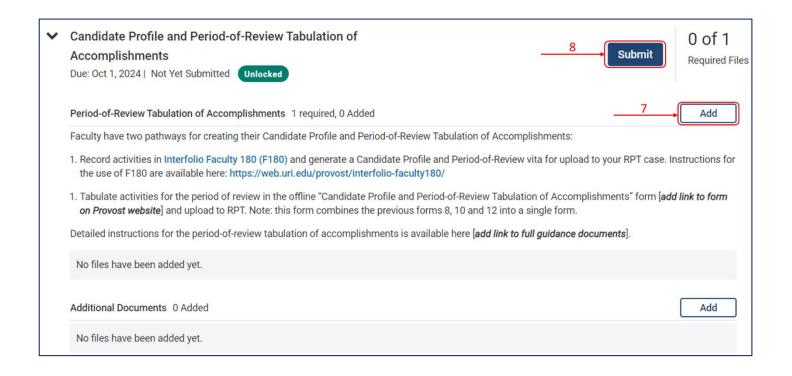
The <u>Candidate Profile and Period-of-Review</u> vita can be generated by following the steps and image below.

- 1. Select Vitas & Biosketches
- 2. Select Legacy Vitas
- 3. Click the Eye icon to the right of the Candidate Profile and Period of Review vita
- 4. Adjust <u>Date range</u> to reflect the review period.
- 5. Select Export/Share and save as a Word document. Open the document in Word then save as a PDF. Saving the Vita as a Word document first before saving as a PDF will create an indexed PDF of your vita that makes it easier for Reviewers to navigate. Indexed PDFs appear in RPT with a heading-level list of sections, or table of contents, in the left-hand navigation column.
- 6. Select <u>Your Packets</u>, then scroll down to the <u>Candidate Profile and Period-of-Review Tabulation of Accomplishments</u> section and select <u>Edit</u>.
- 7. Select Add then upload the PDF version of the Candidate Profile and Period of Review (step 5)
- 8. Select <u>Submit</u> after the <u>Candidate Profile and Period of Review</u> vita and other additional documents are added.









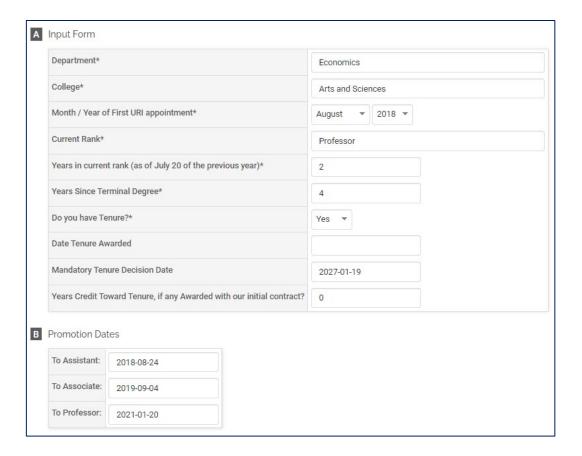
# Candidate Profile and Period-of-Review Tabulation of Accomplishments

The following pages provide a detailed look at individual Faculty180 sections and fields with a focus on how sections and fields are used in the Candidate Profile and Period-of-Review vita.

# **Professional Information**

The <u>Professional Information</u> section is in the <u>Profile</u> form. All fields in the <u>A and B Input Form</u>, shown below, are needed for the Candidate Profile and Period-of-Review vita. When entering information for the first time, users should select the <u>Add</u> button. Thereafter, when information needs to be updated, for example after a promotion, users should select the "Pencil" icon, highlighted in the image below, to edit this entry. Do not use the Add button, which would create a new entry. There should only be one line of information.

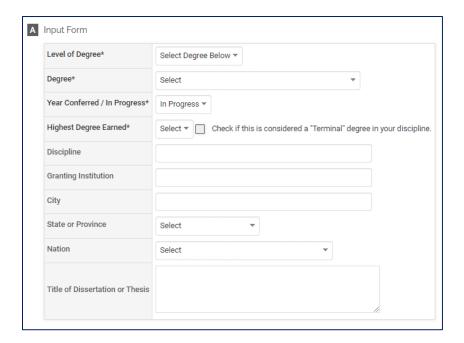




# Degrees Earned

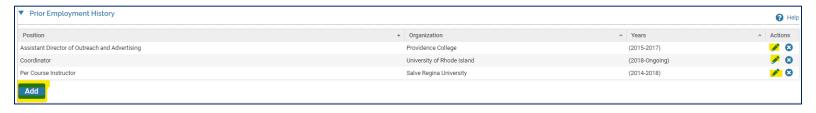
The <u>Degrees Earned</u> section is in the <u>Profile</u> form and is used to capture all degrees earned or in progress. When entering degrees for the first time, use the Add button. To update a degree after it has been entered, use the pencil icon on the right. See Highlights below. All fields in the <u>A Input Form</u>, shown below, are used in the Candidate Profile and Period-of-Review vita.

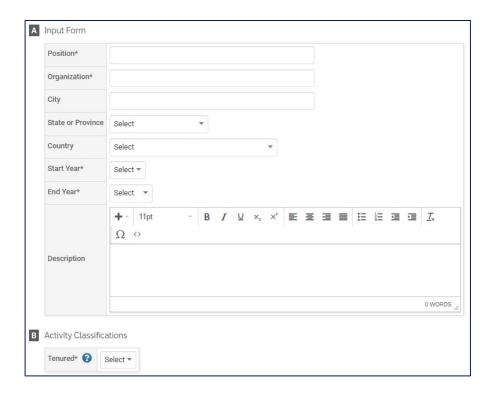




### **Prior Employment History**

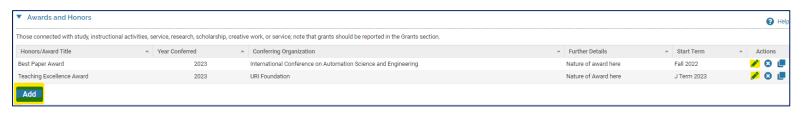
The <u>Prior Employment History</u> section is found in the <u>Profile</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. Include all academic appointments including rank and tenure status (do not include teaching assistant or equivalent; however, list periods of self-employment and other relevant professional employment). All fields found in the <u>A and B Input Form</u>, shown below, are needed when using the Candidate Profile and Period-of-Review vita.

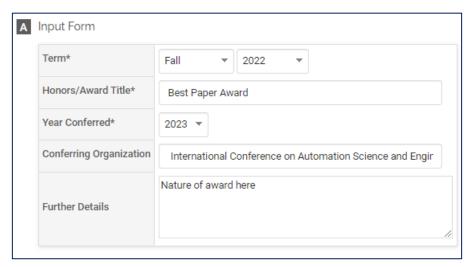




# Awards and Honors

The <u>Awards and Honors</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

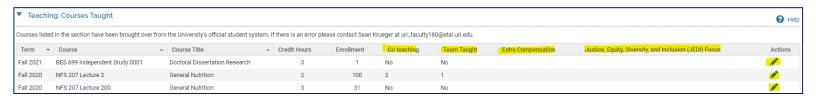




# Teaching, Learning and Advising

### List of Courses Taught by Semester

The <u>Teaching: Courses Taught</u> section is found in the <u>Activities</u> form. Courses are brought over to Faculty180 using the official course catalog and instructor records from e-campus. If there is an error, or you would like to have courses brought in prior to Spring 2018 please contact Sean Krueger at <u>uri\_faculty180@etal.edu</u>. The highlighted fields below need to be completed for use in the Candidate Profile and Period-of-Review vita. Select the Pencil icon next to each section to enter this information. The second image below shows what the data entry screen looks like for each course. Fill in the highlighted Activity Classifications and save.

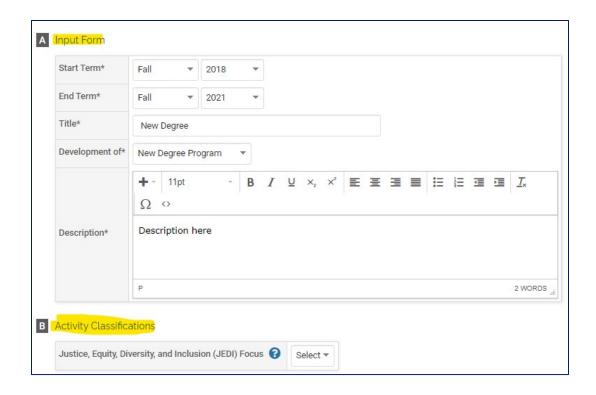




### Major Course/Curriculum developments or revisions

The <u>Teaching: Course/Curriculum Developments and Revisions</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

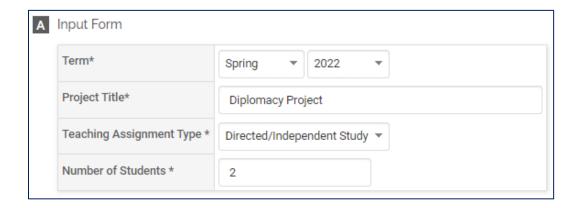




# Independent Studies and Other Learning Projects

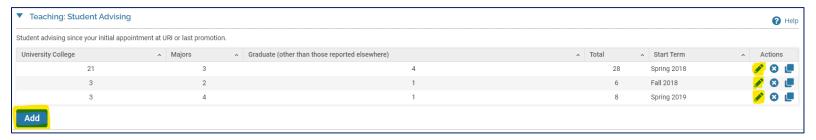
The <u>Teaching: Independent Studies and Other Learning Projects</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

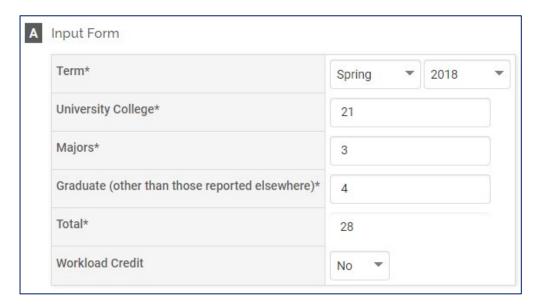




### Student Advising

The <u>Teaching: Student Advising</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

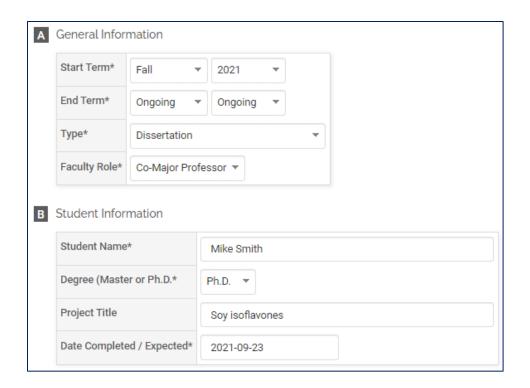




#### **Graduate Student Mentoring**

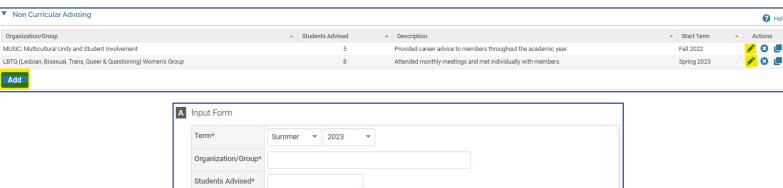
The <u>Teaching: Graduate Student Mentoring</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.





## Other Student Mentoring

The <u>Non-Curricular Advising</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.



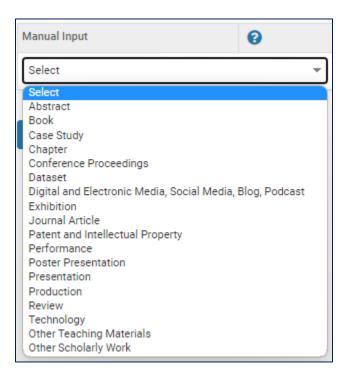
# Research, Creative, and Other Scholarly Activity

# Scholarly/Creative Works

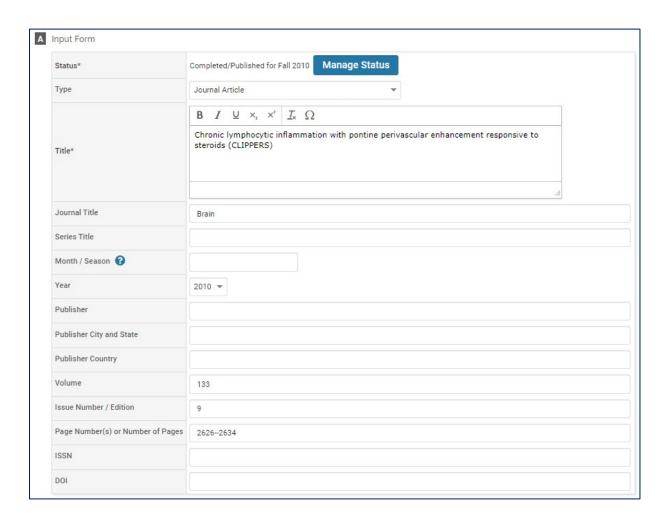
The <u>Research: Scholarly Contributions and Productions</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields needed to create a citation should be added on the Input form. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

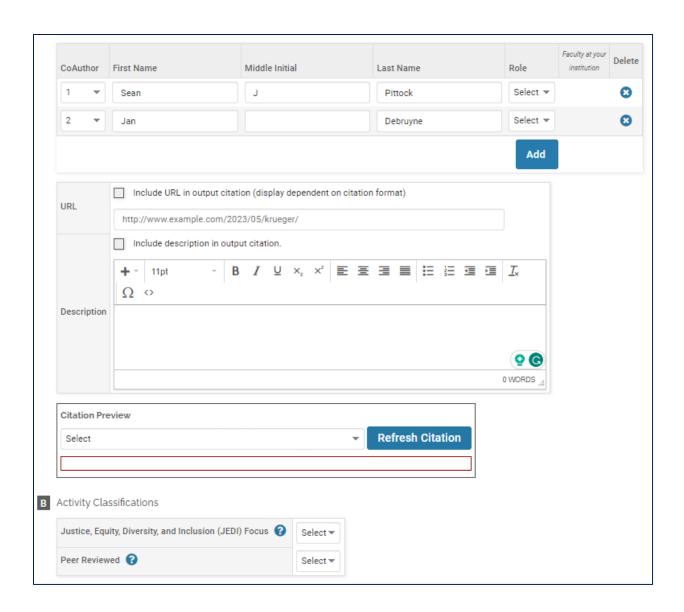


A list of Scholarly Contributions and Productions activity types are shown in the image below. Many of these have subcategories.



When adding Journal Articles, fill in the **Activity Classification** – **Peer Reviewed** found at the very bottom of the Input Form (see Input Form B). To change the status of an entry, select the "Manage Status" button found at the top of **Input Form A**. Scholarly contribution bulk upload instructions can be found <u>here</u>.

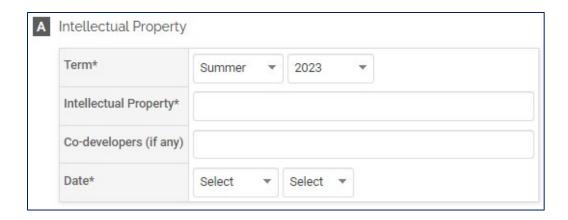




### Intellectual Property

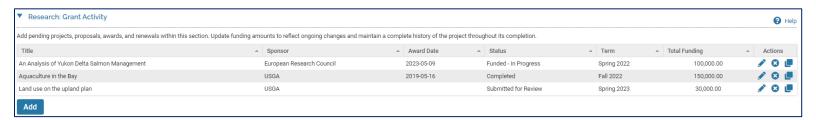
The <u>Research: Intellectual Property</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.





# External and Internal Funding & Grant Proposals

The <u>Research: Grant Activity</u> section is found in the <u>Activities</u> form. This section includes both Grants and Grant Proposals. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields <u>Highlighted</u> in the images below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

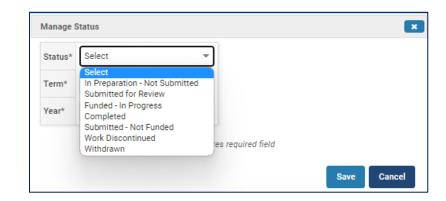


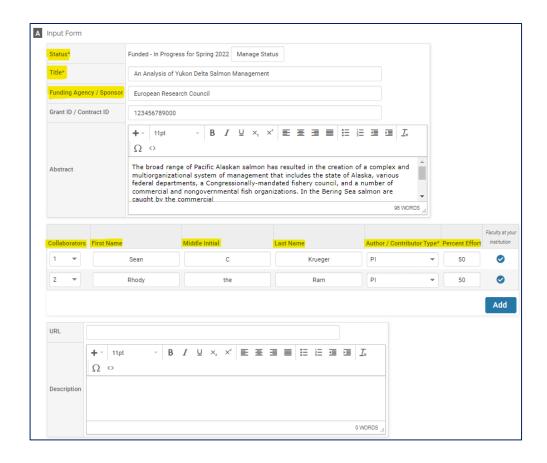
### **Grants** should use the Statuses.

- Completed
- Funded In Progress

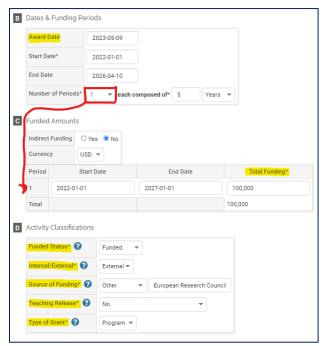
#### **Proposals** should use the Statuses.

- Submitted Not Funded
- Submitted for Review





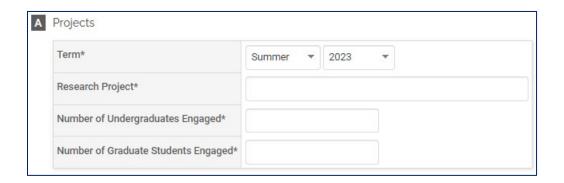
Total Funding is a required field and should be used for both Grants and Proposals. Only Grants should use the Award Date field. If there is more than one funding period - use the Number of Periods fields to expand the Funded Amounts table. However, only the Total Funding field will show on the tabulation vita.



# Student Engagement in Funded Research

The <u>Research: Student Research Projects</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entry. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.



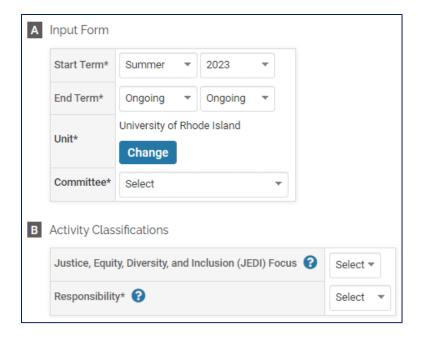


## Service and Professional Outreach

# **Institutional Committees**

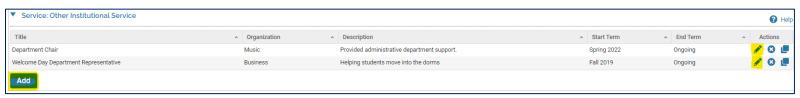
The <u>Service</u>: <u>Institutional Committees</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.

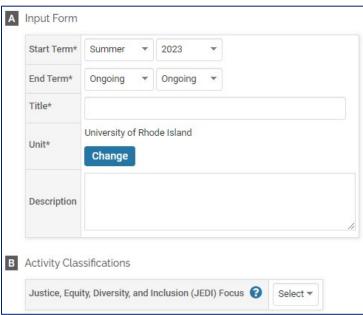




#### Other Institutional Service

The <u>Service</u>: <u>Other Institutional Service</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.





# Professional Service/Outreach

The <u>Service: Professional</u> section is found in the <u>Activities</u> form. To add new entries, select the Add button, to update past entries, select the pencil icon to the right of each entire. All fields shown in the second image below are used in the Candidate Profile and Period-of-Review vita. To learn how start and end dates effect inclusion during a period of review vita please review the <u>Date</u> section from this guide.



