ACCESSING THE FACULTY INSIGHT PORTAL

This guide is designed to help faculty navigate the portal, streamlining faculty activities into a single source. It supports global research collaboration, accurate administrative and accreditation reporting while facilitating workflows such as promotion, tenure, and annual reviews.

LOGGING IN:

1. **Log in:** Enter the Faculty Insight portal and enter your Gatorlink username and password.
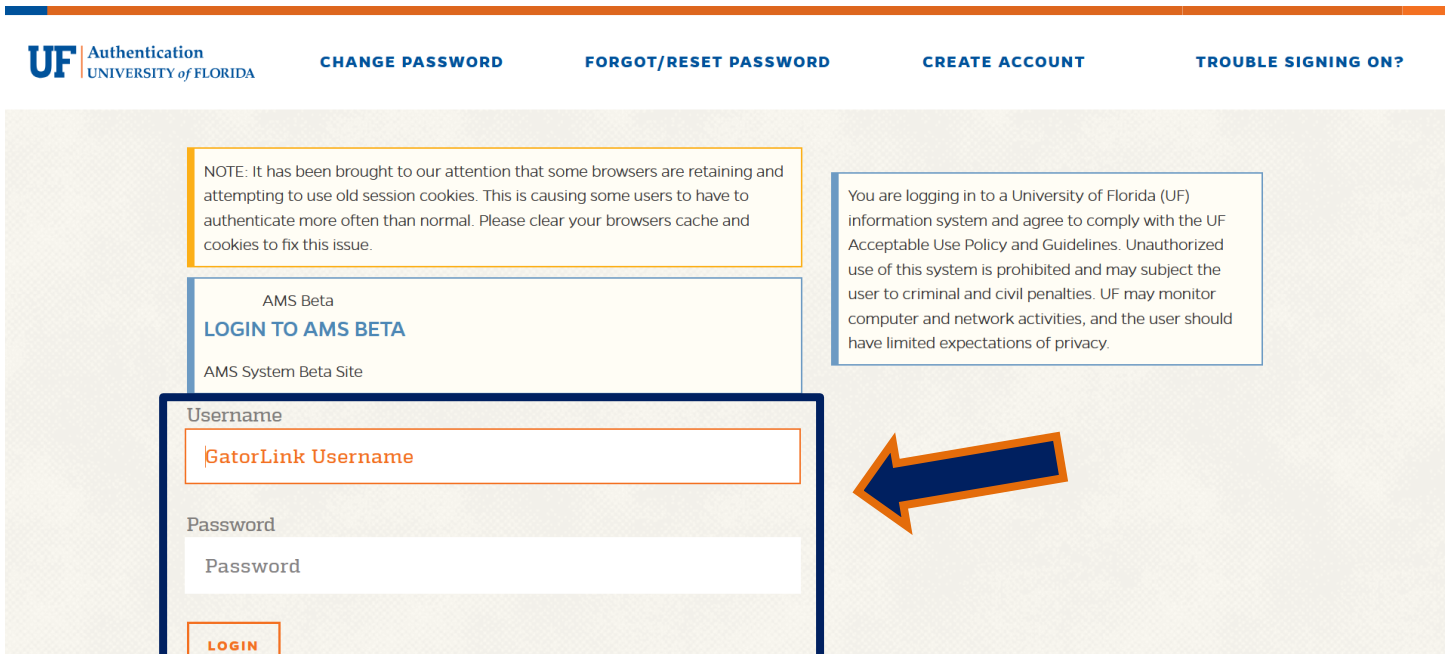
NOTE: Throughout this guide, you will see images of the system showcasing various faculty activities within the portal. These screenshots are provided to demonstrate navigation features.

For detailed guides on specific activity sections (such as *Career*, *Awards and Honors*, *Teaching & Mentoring*, etc.), please refer to [insert link to toolkit page].

HOME SCREEN

Once logged in you will see the Faculty Insight home screen.

ACTIVITIES TAB:

1. **Click on the Activities tab:** Use the left-hand navigation menu to explore activity categories (or sections) such as *Clinical Activities*, *Creative Works*, *Scholarship*, and others.

EDITABLE AND NON-EDITABLE RECORDS

Once you choose a specific activity section, you will see fields to add self-entered records. Those records are editable. There are other activity sections with records that you are not able to edit since they come from external data sources such as *myUFL*, *Press Ganey, GatorEval*, etc. However, you will be able to manage those records as well using the features discussed in this guide.

CREATING RECORDS:

1. **Expand Sections:** Click on any activity section (e.g., Clinical Activities, Creative Works) to reveal subsections or records *(Career section example is shown here).*

NAVIGATION TIP: Use arrows to both expand and collapse activity sections.

2. **Select Subsection**: Each activity section has subsections related to that category. Once you have expanded the section, choose which subsection record you want to view *(Consulting subsection example is shown here)*.

3. **Fill in required information**: If editable, use the blank fields to input your information.

NAVIGATION TIP: Though not all fields are required, it is highly recommended that you fill in as much relevant information as possible to capture your faculty activities accurately.

NOTE: The portal allows a variety of ways to capture your faculty activities such as dropdown menus, document uploads, and more. To learn about the type of information allowed in the individual sections at a glance, visit the FEA Dictionary. [insert link where the FEA Crosswalk will be housed]

TYPES OF INPUT FIELDS

1. **Dropdown Menus:** Several activity subsections have dropdown menus to further specify and categorize your work. Refer to the individual section instruction guides for the definitions and key terms in select dropdown menus.

Activity Manager

- Awards & Honors
- Career
  - Consulting
  - Degrees
  - Faculty Life Cycle Events
  - Licenses & Certification
  - Profess... ...lopment
  - Professional Experience
  - Professional Membership
- Clinical Activities

← Home / Activity Manager / Consulting

Add information below to create record

Description

0 / 2000

Type of Consulting   Required

- Non-Governmental Organization (NGO)/Non-Profit Organization
- Litigation
- Government
- For Profit Organization
- Academic
- Other

NAVIGATION TIP: For open response fields, use the resize icon (highlighted in the image) to drag the text box and increase the available space for easier typing or viewing.

2. **File Upload:** In some subsections, you will have the ability to upload documents. To get started, simply click the **Add Documents** button.

State

Country

+ **Add Documents**

3. **Select File:** Attach supporting documents by choosing the **Browse** button to upload and name the file.

> **NAVIGATION TIP:** To easily find documents later, clearly name files with specific and descriptive titles (e.g., "Consulting_Report_2024").

4. **Checkboxes:** Pay attention to checkboxes that exist under fields throughout the portal. Checkboxes help to clarify further details about the information you input.

5. **Add Collaborators:** Certain subsections have an input field for you to add the information of those you worked with when completing faculty activities. Start by selecting the **Add Collaborators** button.

6. **Input Collaborator Information:** Add additional collaborators by entering their names, affiliations, roles, author order, etc. The faculty member's details are pre-filled.

(Example from Creative Works section)

7. **Create Record**: Click **Create Record** to save your entry. A confirmation on the bottom right will appear. Once saved, you can view or edit your record as needed in the **Manage Your Records** section.

VIEWING AND EDITING RECORDS:

1. **View Record:** Once you create your record, scroll down to **Manage Your Records**.
2. Click on a row or the **Actions** menu to view detailed information about a record.

Activity Manager

Awards & Honors
Career
Clinical Activities
Creative Works

← Home / Activity Manager / Book Chapters

Add information below to create record

Create Record   **Clear Form**

Publication Date   Required

mm/dd/yyyy

☐ No release date

1 NAVIGATION TIP: Click **Clear Form** to reset all fields to their default state if you need to start over while creating or editing a record.

Manage your Records

2 NAVIGATION TIP: Clicking on an entire row is a quick, one-click method to expand, edit, and view activity records.

🔍 Search for an activity...

Filter ▾

Records per page: 20 ▾

Showing 1 - 1 of 1 Records

	Chapter Title	Book Title	Year ↓≡	Actions
☐	Energy from Alcohol	Comprehensive Handbook Of Alcohol Related Pathology	2004	⋮
	Source: AcA Visibility: Public			

3 NAVIGATION TIP: Using the **Actions** menu unlocks additional features to manage records.

Year ↓≡   Actions

Related

View/Edit
Report Issue
Exclude from CV/Reporting ⬤
Set Visibility

ADDITIONAL ACTION MENU OPTIONS

In addition to the **View/Edit** option, the Action menu allows other options for managing activity records.

1. **Report Issue:** Depending on the data source, you will need to reach out to the appropriate contact to correct or report an issue. When you select Report Issue, you will see the contact details for the specific data source from the entry you selected. This allows you to report any technical issues or data discrepancies quickly and accurately for non-editable sections.

2. **Exclude from CV/Reporting:** This allows faculty to tailor their CV and reporting outputs by excluding irrelevant or incomplete records.

3. **Set Visibility:** Records can be set to public, private, or internal only. This allows faculty to efficiently manage who can see activity records.

Set Visibility ✕

⦿ Public
   Visible to all

○ Private
   Visible to only you

○ Internal Only
   Visible to everyone within your institution

Cancel   Set

NOTE: For non-editable sections that come from an external data source, faculty can view, exclude, or report issues with these records. To learn more about which sections are editable and which are self-entered, view the FEA Dictionary. [Link to where crosswalk will live]

BULK ACTIONS

The Faculty Insight portal allows for a streamlined management of records, particularly those with a high volume of entries by using several built-in features.

1. **Bulk Actions (Option 1):** Use the check box next to *Title* and it will act as multi-select tool to select all records on the page to update them simultaneously.
2. **Select Records:** All the boxes will then be filled with a blue check mark indicating all the records that have been selected. To unselect any entries, simply click the check mark.

Manage your Records

NAVIGATION TIP: Click the **Records per page** dropdown menu choose the number of records you want to see on a page at a time.

NAVIGATION TIP: Click the **Clear Selection** button to clear all selections at once if no longer needed or to adjust.

3. **Bulk Actions (Option 2):** If you prefer to manually choose multiple records instead of selecting all entries on a page, simply click the boxes next to individual entries without clicking the box next to *Title*.

> **NAVIGATION TIP:** *Bulk Action Option 1* on the previous page is best when a larger number of records need to be updated.
>
> *Bulk Action Option 2* on this page is best when a small number of records need to be updated.

4. **Perform Actions:** Once you have selected the record entries that you want to update, choose which actions you want to take to update the records. You can choose to **Exclude from CV/Reporting** or change the **Visibility**.

5. **Save changes when complete:** A confirmation will appear in the bottom-right corner.

FILTERING RECORDS

The Faculty Insight portal offers options to filter through records once they are updated to find them quickly.

1. **Filter by Search:** Use the search bar to find specific records by title, year, key words, and other search terms inputted in the fields.
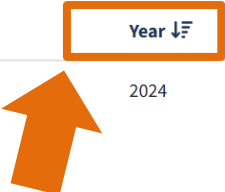
Manage your Records

2. **Filter by Year:** Use the **Year** button next to the **Actions** menu to search by year. The list of records default to showing the newest records first.
   - **Oldest records first**: Press the button one time to re-order the list to show the oldest records first. The arrow next to the word Year will turn upwards. **Year** ⬆⬇
   - **Randomize records:** Press the button a second time to randomize the record entries. The arrow next to the word Year will change into double arrows. **Year** ⬍

3. **Filter button:** Using the Filter dropdown, select filtering options which includes options for visibility (public, private, or internal only) and source (imported or created).
4. **Apply Filters:** Once you have selected the desired filter options, select **Apply Filters**.

NAVIGATION TIP: Source will change based on external data sources for pre-populated sections.
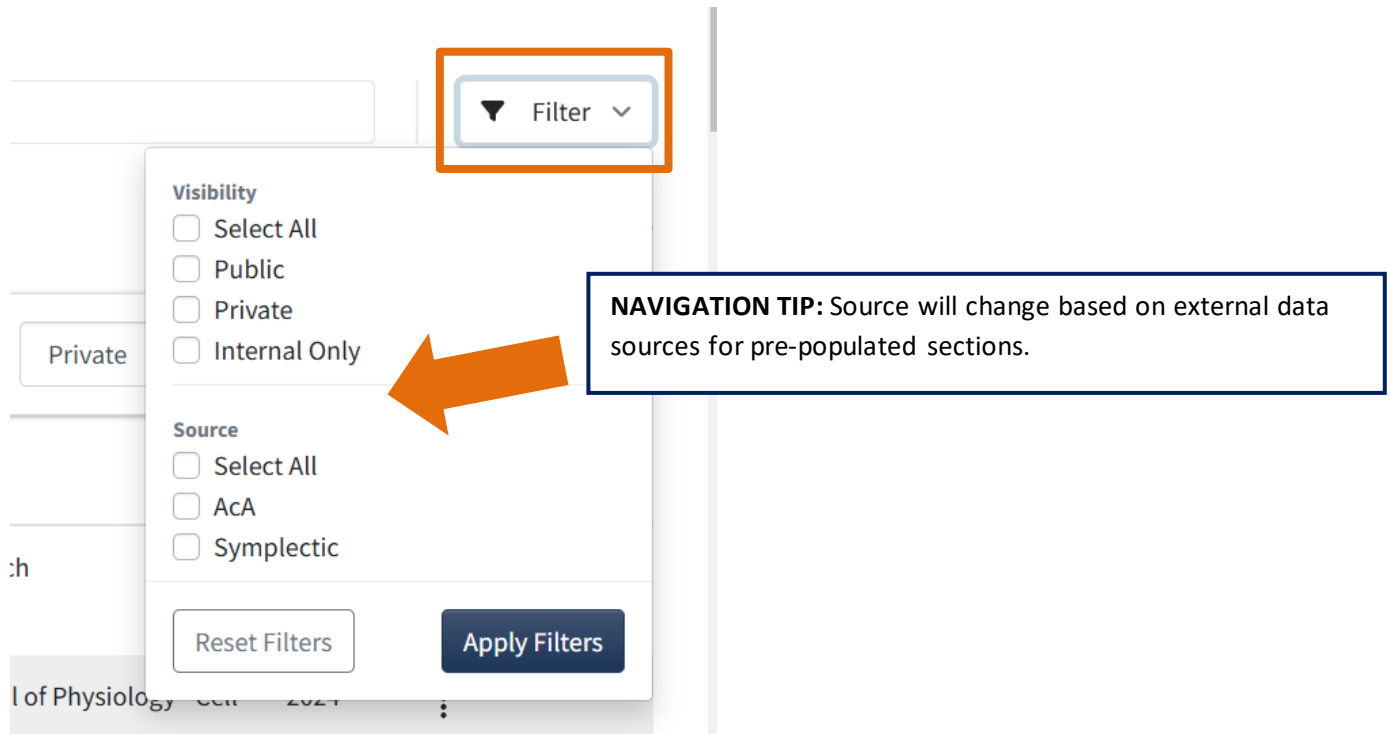
5. Once filter is applied, the records will narrow down to show entries that fit the filter criteria.

You have reached the end of this instruction guide. To see instruction guides from individual activity sections, visit this link. [insert link where toolkits will live.

FOR ADDITIONAL ASSISTANCE

Policies & General Questions

Office of the Provost | Academic and Faculty Affairs

UF-FEA@ufl.edu

Technical Issues

Academic Analytics

facultyinsightproductquality@academicanalytics.com