<u>Outline of Annual Assignment in F180</u>

1. University initiates faculty input period for each semester and notifies the departments the assignment period is open.
2. Chairperson logs into Interfolio and creates assignments for faculty in their unit
   a. How to create assignment:
      i. Click on Administration > Administration > Approve Faculty Input > click on eye icon next to appropriate Input Task (i.e. Annual Assignment Fall 2021) > click on approve (eye icon)
      ii. For the faculty member you wish to assign, click view and approve. This will automatically emulate as the faculty member.
      iii. Create the assignment by editing each section of the activity input form. The University will pre-populate the sections of the form from the previous year's assignment. Alternatively, if there is an activity from other years you wish to add, click View All under the section. This will show a list of historical activities. You can clone an activity by clicking the layered squares icon. Make sure to update the term year and any other data necessary. Click Save to add.
      iv. Once you have finished the assignment, DO NOT CLICK SUBMIT, click Exit Emulation. Repeat steps i through iii until each person in your unit has an assignment.
      v. After all assignments for each faculty member in your unit are complete, go back to the Approve Faculty Input screen and click the email icon. Send a message from the system notifying your faculty to review their assignment.
3. Faculty member logs in and reviews assignment
   a. How to review assignment:
      i. Click on the assignment link under tasks list on Home page
      ii. Review the sections of the assignment. If the faculty member accepts the assignment, click Faculty Final Approval. If faculty member disagrees with assignment, consult with Chairperson. If changes are made to the assignment by the Chair, repeat steps i and ii.
4. Chairperson gives final approval of assignment.
   a. How to approve once the faculty member reviews and approves:
      i. Click on Administration > Administration > Approve Faculty Input > click on eye icon next to appropriate Input Task (i.e. Annual Assignment Fall 2021) > click on approve (eye icon)
      ii. For the faculty member you wish to approve, click view and approve. This will automatically emulate as the faculty member.
      iii. Review the assignment one last time to make sure no changes are needed.
      iv. Click Chair Approves button. Exit Emulation.
5. Dean gives final approval of assignment.
   a. How to approve once the chair reviews and approves:
      i. Click on Administration > Administration > Approve Faculty Input > click on eye icon next to appropriate Input Task (i.e. Annual Assignment Fall 2021) > click on approve (eye icon)

ii. For the faculty member you wish to approve, click view and approve. This will automatically emulate as the faculty member.

iii. Review the assignment one last time to make sure no changes are needed.

iv. Click Dean Approves button. Exit Emulation.

6. Review finalized Annual Assignment:

   a. As the faculty member:

      i. 1 of 2 ways: Go to the Forms and Reports tab

      ii. Under Reports > choose Prior Activity Input Forms> choose from the list of submitted reports.

      iii. 2 of 2 ways: Go to Vitas and Biosketches tab

      iv. Click Legacy Vitas

      v. Click FAU Annual Assignment View button (eye icon)> select the date range and click Refresh Vita.

      vi. Export/Share or Print, if needed

   b. As the Chair or administrator:

      i. Click on Administration > Reports > Under Administrative Reports, click Standard Vitas

      ii. Click on your department

      iii. Choose Annual Assignment Vita Template under Template, choose terms (i.e., AY Fall 2021-Spring 2022) and employment status.

      iv. Click Bulk Export

      v. Click Select Faculty > Choose your unit > Filter by Faculty Type (9-mo/12-mo) > Select Faculty

      vi. Click the file type (PDF). A new window will open with the downloaded zip file. Download times may vary.

      vii. You can export vitas individually by clicking on Vita Export next to the person you wish to download.