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Instructions for
2019 Annual Faculty Activity Report & 2020 Career Planning Document
Instructions have been revised so please review prior to completing the form.

Overview of Deadlines	
ACTION required of *Faculty* **by January 31, 2020**	1. Update and highlight your curriculum vitae (CV) 2. Complete p. 1-26 of Annual Faculty Activity Report/Career Planning Document (referred to as "the FAR form") 3. Upload your FAR form and updated CV to Infoporte 4. ==**New**==: **Email your Division EA** to notify s/he your FAR form and CV are uploaded to Infoporte
ACTION required of *Faculty* and *Chair* **by March 31, 2020**	1. Complete the annual faculty-chair review meeting by mid-March 2. Revise FAR form (p. 1-26) and add chair feedback (p. 27-28) 3. Revise CV as necessary 4. Upload revised FAR form and revised CV to Infoporte 5. ==**New**==: **Email your Division EA** to notify s/he your revised FAR form and CV are uploaded to Infoporte
ACTION required of *Chair* **by April 15, 2020**	1. Chair will review and approve the final FAR form and CV 2. Your Division EA will contact you with any issues

Key reminders:

- <u>Required Software</u>: **Adobe MUST** be used to complete the FAR form (Acrobat Reader DC, Standard DC, or Pro DC 2019). The latest free version is here http://www.adobe.com/go/reader. Contact ITSOP if you need assistance installing.

- <u>You may access your previous FAR forms in Infoporte:</u> Click on "Activity Report" tab and scroll to "Existing Documents." Download with "save file" to a local location on your computer (e.g., desktop, OneDrive). **Note year signifies submission year, not FAR year (e.g., 2019 is the submission year for the 2018 FAR).**

- The FAR form can be completed over multiple sessions. Save in Adobe and continue working on it later.

Step 1: Completing FAR Form and updating CV

Completing FAR in Adobe:

- **Save the blank FAR form to a local location on your computer (e.g., desktop, OneDrive).** *There is no "Upload to Infoporte" button on FAR form*. Blank FAR form is accessible at 3 different locations:
  1. From Email – PDF attachment in FAR launch email from OSPA
  2. From OSPA website – Faculty Career Planning Downloads "2019 Faculty Activity Report and 2020 Career Planning Document (fillable form)" on the Faculty Activity Reporting webpage
  3. From InfoPorte – Click on "Faculty" icon in the upper right, then "Activity Report" tab, and then "Faculty Activity Reporting and Career Planning Blank Template" hyperlink

  If PDF opens within your web browser, "save" or "download" to a local location on your computer.

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- **==IMPORTANT==:** Locate the locally saved blank FAR form and open in Adobe.
  Ensure the blank FAR form is open in Adobe before you begin working on the form.
  - **Do not work on FAR form in other PDF software (e.g., Preview for Macs, Edge for Windows).**
  - **Do not work in a web browser (e.g., Chrome, Firefox, Safari)**. Close Infoporte and web browser.

- When beginning to change the blank FAR form, **"save as" a new file name containing your name and date** to the local location on your computer (e.g., desktop, OneDrive). This saves the modified form separately from the clean blank form.

- **Save progress periodically by clicking "File" and then "Save" in Adobe** to save your FAR form to your computer (e.g., desktop, OneDrive). *There is no "Upload to Infoporte" button on FAR form*. **Complete p. 1-26 of FAR form** in preparation for the annual review meeting.

Updating your CV:

- **Update your curriculum vitae (CV), highlighting all 2019 items** in ==yellow== or ==blue== from the 2019 calendar year (January 1, 2019 to December 31, 2019).

- Periodically **save your updated CV to your computer** (e.g., desktop, OneDrive) for your records.

==New Process==: **Step 2: Uploading FAR and CV to Infoporte**

Upload FAR to Infoporte:

- **Connect to internet and log into Infoporte.unc.edu**. Navigate to "Activity Report" tab in "Faculty Profile."

- The Infoporte FAR homepage has been modified. There are two main sections titled "Upload Documents" and "Existing Documents."
  - There should be zero 2020 files in Existing Documents. Contact Christina Pomykal if otherwise.

- **A key button appears as "Browse" for Windows** and **"Choose File" for Macs** and will be **referred to as the "Browse/Choose File" button**. Disregard sections "Faculty Teaching Statement," "Faculty Research Statement," and box with "Label, File, Browse/Choose File, and Clear."

- **==IMPORTANT==: Ensure "2020" for Fiscal Year (FY) is selected** in drop-down menu ("2020" by default).
  - **2020 is the submission year for the 2019 FAR**. Year signifies submission year, not FAR year.
  - **DO NOT SELECT 2019 AS FISCAL YEAR** as this will overwrite AND delete your 2018 FAR or 2018 CV historic documents.

- **Click the 1st "Browse/Choose File"** button to upload your "Activity Report", and a new window opens to locate your FAR form (remember this year it is saved on your computer).

- **Select your file.** The window closes and your file's name appears next to the "Browse/Choose File" button. Use "Clear" button if incorrect file name is displayed.

- **Click "Submit" button.** The uploaded file now appears as a hyperlink in Existing Documents section.

- **Confirm Year is "2020" and File is "Activity Report (your-file-name)."**

Upload CV to Infoporte:

- **==IMPORTANT==: Ensure "2020" for Fiscal Year (FY) is selected** in drop-down menu**.**

- **Click the 2nd "Browse/Choose File"** button to upload your "CV", and a new window opens to locate your CV saved on your computer.

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- **Select your file.** The window closes and your file's name appears next to the "Browse/Choose File" button.

- **Click "Submit" button.** The uploaded file now appears as a hyperlink in Existing Documents section.

- **Confirm Year is "2020" and File is "CV (your-file-name)."**

- **CORRECT SUBMISSION TO INFOPORTE completed** when both files are in **Existing Documents** as:
  o Year "2020" for "Activity Report (your-file-name)"
  o Year "2020" for "CV (your-file-name)"

- **If you make changes and need to re-upload, repeat steps above.** Infoporte retains the most recently uploaded file.

- **DO NOT DELETE historic files in Existing Documents** from previous years (2019, 2018, 2017, 2016, etc.). These carried over in the interface transition.

- **Troubleshooting tips:**
  o If an **Existing Document needs to be deleted** (e.g. incorrect file uploaded), check the box for the line item and **click "Delete Selected."** A yellow notification at the top of Infoporte will inform you of successful deletion, but the item will remain until you manually refresh your browser using Infoporte's "Submit" button or the browser's "Reload page" button (may need to resend information).
  o If a file was uploaded **using one of the disregarded sections** (Faculty Teaching Statement, Faculty Research Statement, Label/File/Browse box), **locate the file in Existing Documents and delete**.

Step 3: Email your Division EA to notify s/he of your FAR and CV submission to Infoporte

- **By January 31,** your completed FAR form and updated CV must be uploaded to Infoporte.

- ****New**: Email your Division EA to notify s/he your FAR form and CV are uploaded Infoporte.** You do not need to email any documents.

Step 4: Annual Review Meeting and Updating your Form
- Your division administrative assistant **schedules your review meeting** to occur by mid-March.

- **Revise FAR form (p. 1-26) and add chair feedback (p. 27-28)** after review meeting. *Save your FAR form to your computer (e.g., desktop, OneDrive) for your records.*

- Revise CV as necessary.

- **By March 31,** upload your revised FAR and revised CV to Infoporte.

- ****New**: Email your Division EA to notify s/he your revised FAR form and CV are uploaded to Infoporte.**

Next steps:
- By April 15, the chair will approve the final FAR form and CV.
- Your division chair (via the Executive Administrator) will contact you with any issues.

If you have questions at any time throughout the process, please email Christina Pomykal at christina_pomykal@unc.edu or call (919) 966-2021. Thank you!