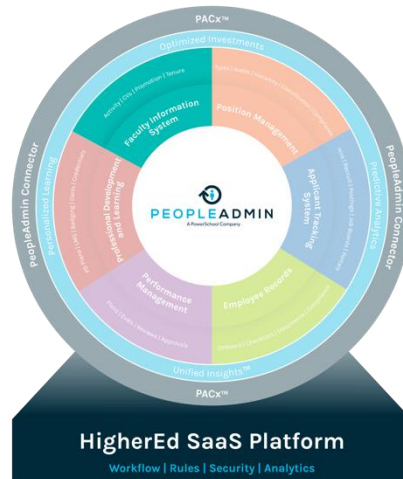


## FIS User Guide for College and Department Leaders

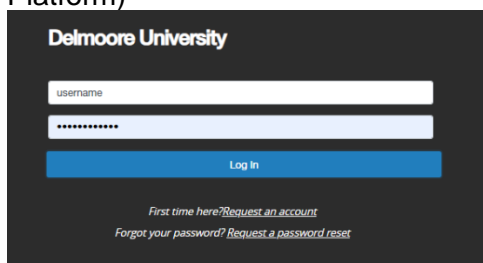
### What is FIS?

- PeopleAdmin's Faculty Information System (FIS) provides a platform to support a faculty member's professional tenure—from hiring and onboarding at a new institution, through professional development, to applying for, and achieving, promotion or tenure. FIS removes time-consuming tasks of administrative paperwork, compiling reports, and more, allowing faculty members to focus on what they do best: research, teaching, and service.
- The powerful FIS recently adopted by your institution provides an intuitive application for faculty members to easily enter historic and ongoing activities, leverage institution CV templates, build personal CV templates as needed, and download or print current CV information quickly.

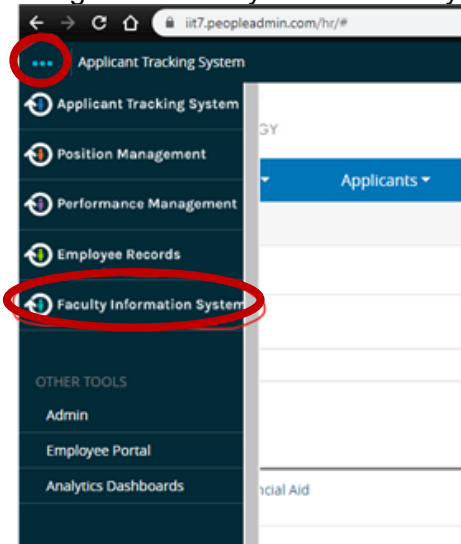


### Log in

- Log in via your institution's directions (Single Sign-On or directly into the HigherEd Platform)



- Navigate to Faculty Information System (if not taken there directly)



## User Profile

- The Faculty Profile is meant to be a professional representation of the faculty member. Basic information is populated by the institution and faculty members are free to edit their user details to reflect their professional identity.
  - For example, if a faculty member's legal name is "Patricia Jones", and they have published their professional work under the name "Tricia Jones, Ph.D.", the faculty member's account should reflect "Tricia Jones, Ph.D.". This will ensure that as faculty members engage with this product, they are representing their professional identity.
- Edit Contact Information
  - The user profile includes the Personal and Contact details which may be populated on a CV or be used to aid in system administration and support.
- Personal and Publishing Information
  - Provide your faculty member ID to other popular research and publication systems to easily sync data and keep your activities up to date.
- History
  - Changes to your account are kept in the history tab. This provides information to help you keep track of changes and troubleshoot as needed.
- Account Settings
  - Additional settings to aid in the administration of your account:
    - Last Logged In date
    - Sign in Count
    - User Since
    - Time Zone

My Activities CV Templates Documents

Users / ffaculty@university.edu

### My Profile [Edit](#)

**Full Name:** Franklin Faculty **Roles:** Faculty  
**Username (email):** ffaculty@university.edu **Organizations:** Delmore University

[Personal Information](#) [History](#) [Account Settings](#)

<b>Personal Information</b>	<b>Publishing Information</b>
<b>Prefix:</b>	<b>Employee ID:</b>
<b>First Name:</b> Franklin	<b>ORCID ID:</b>
<b>Middle Name:</b>	<b>PubMed ID:</b>
<b>Last Name:</b> Faculty	<b>Google Scholar ID:</b>
<b>Suffix:</b>	<b>Banner ID:</b>
<b>Letters:</b>	<b>External authentication:</b>
<b>Title:</b>	<b>Digital Commons URL:</b>
<b>Faculty Type:</b>	<b>Website URL:</b>
<b>Current rank:</b>	
<b>Home department:</b>	

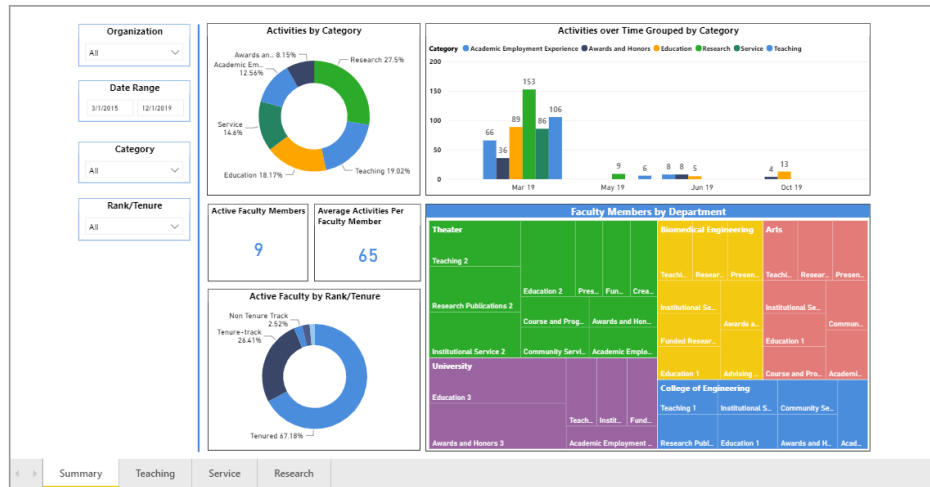
**Contact Information**

**Address Line 1:**  
**Address Line 2:**  
**City:**

## Administrative Dashboard

- Dashboard Overview
  - The Dashboards provide a birds-eye view into what Activities have been reported in this system, highlighting trends in Faculty accomplishments over time. Click on the filters and graphs to isolate data and click “export” on a specific graph or chart to get a download of the underlying data and dig into details.
    - The Summary dashboard can give you a view of Activities over time, and Faculty in your part of the organization.
    - The Teaching tab can give you benchmarks and metrics about Teaching Activities in your site.
    - The Research tab can give you benchmarks and metrics about Research Activities in your site.
    - The Service tab can give you benchmarks and metrics about Service Activities in your site.

**Dashboard**



- Drill-down capabilities
  - Use the left-hand filters to drill down by Organization, such as College or Department, Date Range, Activity Type, and Faculty type, such as Tenured, Tenure Track, and Non-Tenure Track.
- Activity Reporting
  - Institution/College/Department leaders may check completion of Faculty Activity entry in two ways.
    - Use the Faculty Activity Search to see which users have added Activities. Results can be exported into Excel as needed.

Faculty Information System Welcome, Selena Rollins

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**PEOPLEADMIN**

Dashboard | My Activities | Faculty Activities | CV Templates | Documents | Administration

**Faculty Activities**

Search by name or keyword...

Filters [Clear All](#)

- Date Range >
- Organizations >
- Activity Types >
- Faculty Types >

Displaying 1 - 30 of 104 in total

ACTIVITY TITLE	ORGANIZATION	FACULTY MEMBER	FACULTY TYPE	ACTIVITY TYPE	ACTIVITY DATE
<a href="#">National Honor</a>	University of Alexandria	justin.mills@peopleadmin.com		National Honor	03/06/2020
<a href="#">Does this work</a>	University of Alexandria	justin.mills@peopleadmin.com		Hiring Committee	03/06/2020
<a href="#">My First Journal Article</a>	University of Alexandria	Selena Rollins	Tenured	Journal Article	02/15/2020
<a href="#">Team Excellence Award</a>	University of Alexandria	Diana Elaine Martin	Tenured	National Honor	01/01/2020
<a href="#">test</a>	University of Alexandria	System Account	Tenured	Awards	11/29/2019

- Bulk download CVs in the CV Template section to see which CVs are full or empty. The selected CV Template can have the specific parameters Department Chairs are looking for.

Faculty Information System Welcome, Selena Rollins

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PEOPLEADMIN

Dashboard My Activities Faculty Activities CV Templates Documents Administration

### CV Templates

TEMPLATE NAME	AVAILABLE FOR	DATE RANGE	ACTIVITIES INCLUDED	STATUS	ACTIONS
University Template '18-'19...	University of Alexandria	01/01/2018 - 12/31/2018	Public	Published	Actions
Report Draft	University of Alexandria	01/01/2018 - 12/31/2018	Public, Private	Published	Actions
test	Personal	All activities	Public	Draft	<ul style="list-style-type: none"> <li>Edit</li> <li>Move to Draft Status</li> <li>Delete</li> </ul>
cv section move test	Personal	All activities	Public	Draft	<ul style="list-style-type: none"> <li>Download as PDF</li> <li>Download as DOC</li> <li>Download Bulk CVs</li> </ul>
Adjunct Template	University of Alexandria	01/01/2012 - 12/31/2019	Public, Private	Published	Actions
Computer Science CV Template	University of Alexandria	All activities	Public	Published	Actions
Test	Personal	11/20/2019 - 11/28/2019	Public	Draft	Actions
University Template	University of Alexandria	All activities	Public	Published	Actions

- Permissions to dashboard functionality
  - Users with the Admin or Deputy Admin role will be able to see the Dashboards populate with data from users in their assigned organization. User roles can be updated by editing a Faculty Member's User Profile.

Faculty Information System Welcome, Selena Rollins

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PEOPLEADMIN

Dashboard My Activities Faculty Activities CV Templates Documents Administration

Users / luke@example.com

### My Profile

Full Name: Luke Nguyen Roles: Faculty

Username (email): luke@example.com Organizations: University of Alexandria

[Personal Information](#) | [History](#) | [Account Settings](#)

<h4>Personal Information</h4> <p>Prefix:</p> <p>First Name: Luke</p> <p>Middle Name:</p> <p>Last Name: Nguyen</p> <p>Suffix:</p> <p>Letters:</p> <p>Title:</p> <p>Faculty Type: Tenure-track</p>	<h4>Publishing Information</h4> <p>Employee ID:</p> <p>ORCID ID:</p> <p>PubMed ID:</p> <p>Google Scholar ID:</p> <p>Banner ID:</p> <p>External authentication:</p> <p>Digital Commons URL:</p> <p>Website URL:</p>
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### Edit Luke Nguyen

First Name

Middle Name

Last Name

Suffix

Publishing Information

Employee ID

ORCID ID

PubMed ID

Google Scholar ID

Banner ID

## Activity Management

- What are activities?
  - Activities are individual entries which can represent the online digitization of a faculty member's CV. The online activity management tools allow faculty to manage their activities in one place, share details with their department and institution, and download/print in any format using the CV management tools (detailed later).
- View, add, and edit your activities directly from the home page.
  - Activity categories are set by your institution and fall in areas such as Education, Professional Development, Teaching, Research, and Service. Activity sub-categories help group activity types for clearer understanding of which activity entry form is most appropriate to use across different departments and include the common options such as:
    - Degrees earned
    - Certificates and licenses
    - Scheduled teaching and directed student learning
    - Program and course development
    - Publications
    - Presentations
    - Intellectual property
    - Research, grants, and fellowships
    - Institutional service
    - Professional service
    - Awards
    - Honors
    - Etc.

**My Activities** | ⚙️

Activities for last year ▾

**Contact Information** ✎

Franklin Faculty  
#faculty@university.edu

**Attest** + ▾

There are no activities to be displayed.

**Awards and Honors** + ▾

There are no activities to be displayed.

- Use the arrow icon to expand or collapse a section
- Edit an existing activity using the pencil icon
- Add an activity using the 'Add +' icon

Delmore University

My Activities | CV Templates | Documents

My Activities / Add Activity: Bachelors Degree

**Add Activity: Bachelors Degree**

Categories: Education

Name of Degree \*

Field of Study/Discipline

College/School/University Name \*

Date Earned \*

Collaborators

Attachments

Attach previously uploaded files from your Dossier, or add a new file.

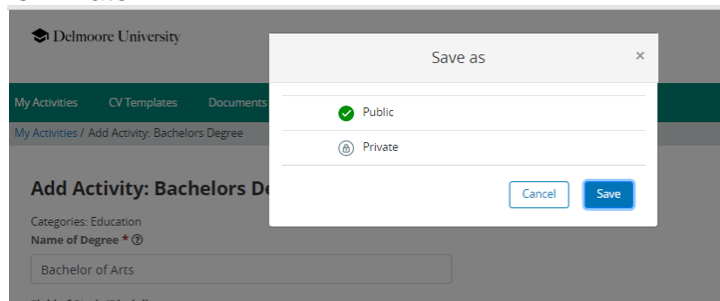
- When adding an activity, you may directly link a document from your online Dossier by selecting 'Browse Dossier'.

**New Document** ✕

What kind of file are you uploading? \*

- Choose a Document Type to upload
- Choose a Document Type to upload**
- Curriculum Vitae
- Biographical Sketch
- Grant/Funding Award Letter
- Publication - Upload Work Here
- Publication - URL Link
- Statement
- Supporting Documentation - Other File Type
- Supporting Documentation - URL Link
- FIS Test

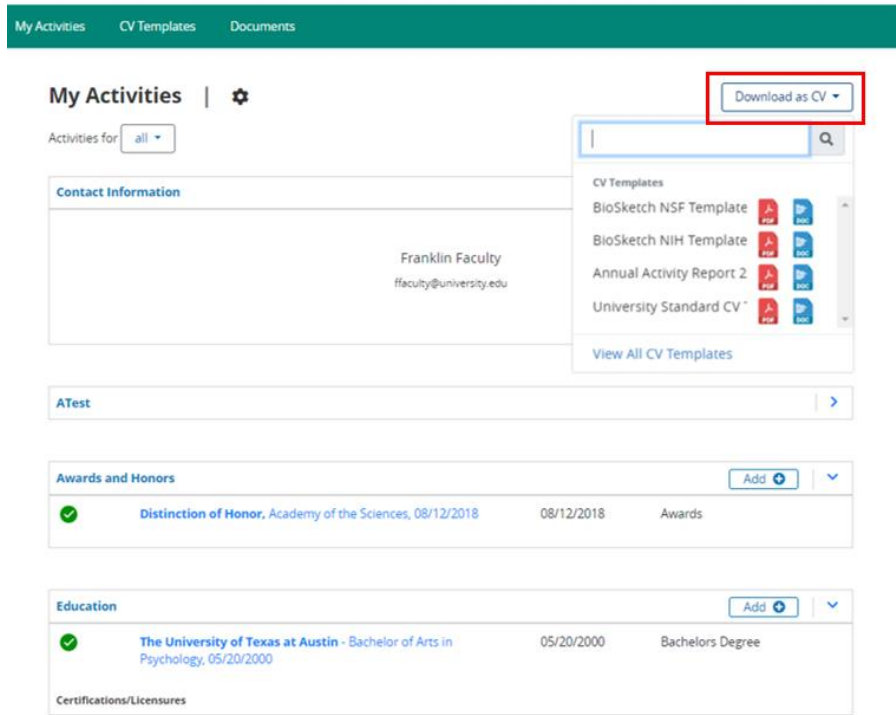
- Alternatively, you may add a document directly using the ‘Upload Now’ icon. Any document you upload to an activity will also be saved to your Dossier for future use.
- Save the activity using the ‘Save’ button. You will be prompted to indicate whether the activity is Public or Private.
  - Public activities are visible and reportable to the institution. Most activities should be saved as Public, so that the institution can recognize faculty for their accomplishments and report as needed. Public activities have a green check mark icon to indicate that this activity is public.
  - Private activities are not visible and not reportable to the institution. Activities which are saved as private are meant to allow faculty to personalize their CVs with supplemental information as needed. Private activities have a lock icon to indicate that this activity is Private.



## CV Management

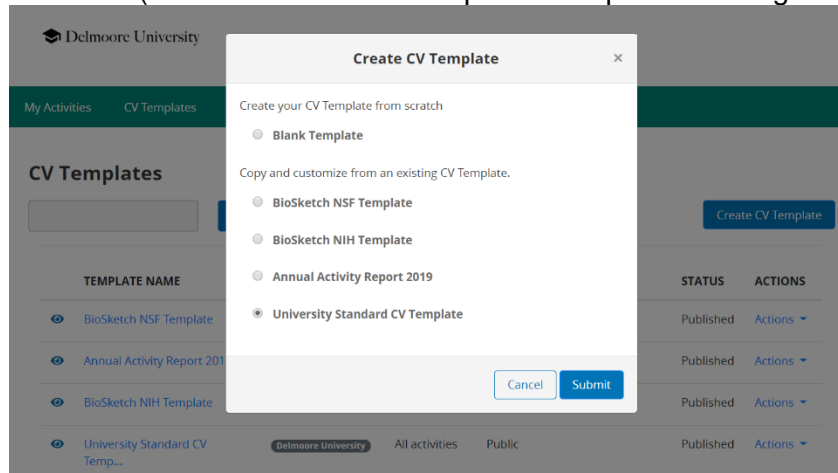
- The innovative and powerful CV Template Management tool allows faculty members to leverage institution templates pre-loaded into the system or create and save their own template for exporting activity data to download or print.
- There are a couple of ways to download your activities in a CV template. If you already know what template you want to use, you can use the quick button "Download as CV" at the top of your My Activities page. If you want to preview and peruse all available templates, select ‘CV Templates’ from the navigation bar.
- Use CV template
  - You can use a CV Template at any time from the My Activities page.
  - Click “Download as CV” to select the CV Template you would like to use. Click on either the red .PDF or the blue .DOC icon to download your file in the desired format.
  - If you would like to see all templates, preview, or create a new one, click “View All”.





## Create CV template

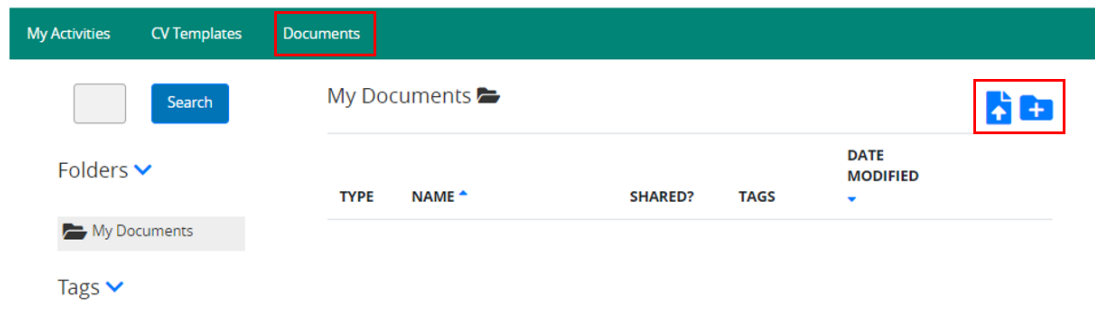
- The easiest way to create a CV Template is to copy from an existing template, such as “University Template.”
- Settings
  - Define the name of your template, who it should be shared with, the date range you would like to pull in, and whether we should only be pulling in public or private activities. (See difference between public and private settings above).



- Heading
  - The heading style you define here will appear at the top of your CV when it is downloaded. If you define font and style here, it will not apply to the rest of the body of the CV.
- Structure

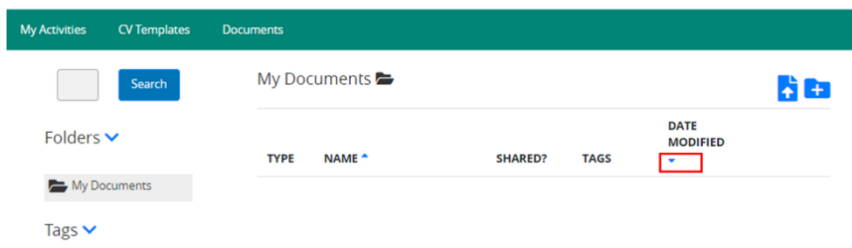
- Define Sections to place your activities in.
- If you need sub-sections to group your activities, you can make sub-sections under a Section.
- To pull in a specific type of activity information into this CV Template, click “Map Activities”.
- When you map a specific type of activity form here, your information will populate in this section (or subsection) upon download.
- **Style & Format**
  - In Style & Format, you can choose the citation style used by the CV Template (as defined by your site administrator), the font style, font sizes, and line height. The settings made in this page apply to the body of the CV Template, not the header.
- **Review & Publish**
  - A preview will allow you to review what the CV template will look like. You can go back to different sections of the CV Template Builder to make changes.
  - When you Publish a template, it will be available for the organizations you shared it with. While the template is still in Draft, it will not be shared.
- **Build Dossier of Documents**
  - Create your personalized dossier – a secure and comprehensive space for faculty members to collect and organize achievements, involvement, and publications.

 Delmoore University



- **Upload**
  - To upload a new file, click the upload icon in the top right. You can select a document from your computer and select what type of document it is.
  - Document Types are defined by your site administrator and have rules around them such as “Convert to PDF” or “Allow a URL instead of a document”.
- **Add a new folder**
  - To add a new folder, click the folder icon.
- **View, sort, and filter using the arrow icons in each column.**

 Delmoore University



- Tag
  - You can tag documents to group like documents together.
  - For example, if there is a document pertinent to an upcoming promotion packet, you can create a tag such as “2021 Promotion Material”. Later, you can view all documents with that tag to easily pull them up together. Between folders and tagging, faculty have robust tools for organizing their documents.



TYPE	NAME	SHARED?	TAGS	DATE MODIFIED	
	Biosketch NSF 2020	Public	<b>Favorite</b>	04/06/2020	 <a href="#">Actions</a>
	Curriculum Vitae	Public		01/24/2020	 <a href="#">Actions</a>
	Curriculum Vitae 2020	Private		03/03/2020	 <a href="#">Actions</a>
	Doc	Public		02/21/2020	 <a href="#">Actions</a>
	Grant Award Letter 2019	Public		03/20/2020	 <a href="#">Actions</a>
	Recent Research_Rollins 2019	Public		01/24/2020	 <a href="#">Actions</a>

- Public and Private Documents
  - Public Documents are searchable by administrators. This allows administrators to quickly find relevant documents, aiding them in the identification of faculty for opportunities such as grants.
  - Private documents are only visible to the individual faculty member who uploaded it. These documents can be used in the promotion and tenure process later, or simply stored securely for future use.

## ADMIN ONLY – REMOVE FROM THIS DOCUMENT

- Search Faculty Activities
  - Quickly find faculty who have accomplishments in a particular discipline or area of study by keyword, in a certain part of your organization, by a certain date range, activity type, or by Faculty type.
  - Filters: Organization, Date, Activity Type, Faculty Type (Tenure, Tenure Track, Non-Tenure Track).
  - Search by keywords
  - Download results (in .csv format)
    - Download Visible Fields (only download the columns you see on the screen, all rows).
    - Download All Fields (download all fields associated with each activity type in your search results).